StockFinder®

StockFinder 5 User Guide

Updated April 2010

WORDEN

STOCKFINDER 5 USER GUIDE

Worden Brothers, Inc.
www.Worden.com

Five Oaks Office Park
4905 Pine Cone Drive
Durham, NC 27707

STOCKFINDER®5 USER GUIDE

StockFinder 5 Reference

Welcome to StockFinder 5

Welcome to StockFinder 5! StockFinder is a market analysis software that has been designed to combine an easy-to-use interface with feature flexibility, so that with little prep time, you can start to use the software to enhance the way you trade.

This reference should serve as a guide to software features and their implementation. This guide should provide you with a firm foundation upon which to build. There are no trading strategies or instructions here; this guide offers no trading advice, so you should not make any trading decisions based on any information contained here.

Should you encounter inaccuracies or material that requires correction, please feel free to make note of needed modifications.   Send such notes to **support@worden.com**.

Call Worden Brothers, Inc. toll-free to set up a StockFinder account or to have questions about an existing account answered. **(800) 776-4940**

StockFinder Data

OBTAINING AND INSTALLING STOCKFINDER DATA

StockFinder is an analytical tool offered by Worden Brothers, Inc.

Call Worden Brothers, Inc. toll-free to set up an account or to have any questions answered.
 (800) 776-4940

StockFinder may be installed via web-based download or CD. In either case, in order to install the software, disable any anti-virus and firewall software before you begin installing StockFinder 5.0. Some antivirus software has been known to interfere with the installation files and may cause an incomplete installation. Be sure to re-enable your anti-virus software once you have completed the installation!

Follow the wizard to install the StockFinder software. It may require you to install the Microsoft .Net 3.5 framework. Installing the .Net framework may require an additional 40 megabyte download and will require an internet connection.

You can also install the Microsoft .Net 3.5 framework directly from Microsoft in one of the following locations:

http://msdn.microsoft.com – Microsoft Developers Network
http://tinyurl.com/2jytnj - .Net 3.5 Framework Download

STREAMING REAL-TIME VS. END OF DAY UPDATE

Streaming Real-Time (Platinum Only)

To connect to the real-time stream, you must have an active Internet connection.   The real-time stream connection will initiate automatically in StockFinder and does not require any action on your part as long as you are connected to the Internet.

The *Data Status* bar located in the main menu area provides information about the most recently downloaded real-time data.   The *Data Status* bar looks similar to the graphic below.

Real-time data will begin streaming at 9:30am ET each market day and will continue until the market closes. You may see a few trades trickle in as the market settles, but the feed does not cover after hours trading.

End of Day (Gold Only)

End of Day data is only downloaded to your software once per day, after the market closes.   If this is the type of data you have loaded onto your machine, you will be able to work in bar intervals with granularities equal to or greater than one day.   One day, two day, three day, one week, one month, etc.

The Data Status bar located in the main menu area provides information about the most recently downloaded data to your machine.

> **Note:**
> **If for any reason you have a problem downloading intraday or end of day data, please call Technical Support at (919) 408 - 0542.**
>
> **If you identify an error in Price or other indicator information, please report it to the Data Department via *Help | Report Data Issue* within StockFinder®.**

TYPES OF DATA

There are many data feeds available for StockFinder. Some of these Data Types are available within both the Gold and Platinum service levels; however, some Data Types are available only with Platinum service. Platinum-exclusive data is so labelled in the descriptions that follow. The list below can be viewed via the *StockFinder Data Installer* at any time. To access the Data Installer, select the *Settings Menu*, and choose *Add/Remove Data*.

US End of Day -- Over 25 years of daily data on all common stocks on NYSE, Amex, and Nasdaq. This includes individual equities, exchange traded funds, indexes and Morningstar industry groups.

US RealTime Minute Data -- Streaming real time data with up to 5,000 bars of intraday data in on all of the common stocks and exchange traded funds on the major US exchanges: Amex, Nasdaq and NYSE. **Platinum Only**

US Historical Fundamentals and Financial Stats by Morningstar -- Over 40 major critical fundamentals historically plotted for up to 15 years. (See Data Sheet section for full list of fundamentals included.) **Platinum Only**

US Zacks Estimates and Ratings -- Analyst buy/hold/sell ratings as well as earnings estimates for recent quarter and year and projections for next quarter and year (historically plotted) for all stocks in the system. **Platinum Only**

News Buzz -- Real-time composite of over 70 financial news sources plus proprietary indicators based on the news stories. **Platinum Only**

US Mutual Funds -- Daily NAV (Net Asset Value) for nearly 20,000 mutual funds broken down into their families and categories. **Available as Additional Subscription**

Canadian Basic (Daily End of Day) -- 10 years of daily data on all of the stocks in the TSX (Toronto Exchange) and the Venture TSX. **Available as Additional Subscription**

Canadian Fundamental Criteria by Morningstar -- Over 40 major critical fundamentals as calculated in the Canadian markets historically plotted for up to 10 years. **Available as Additional Subscription**

Canadian Zacks Estimates and Ratings -- Analyst buy/hold/sell ratings as well as earnings estimates for recent quarter and year and projections for next quarter and year (historically plotted) for all stocks in the system. **Available as Additional Subscription**
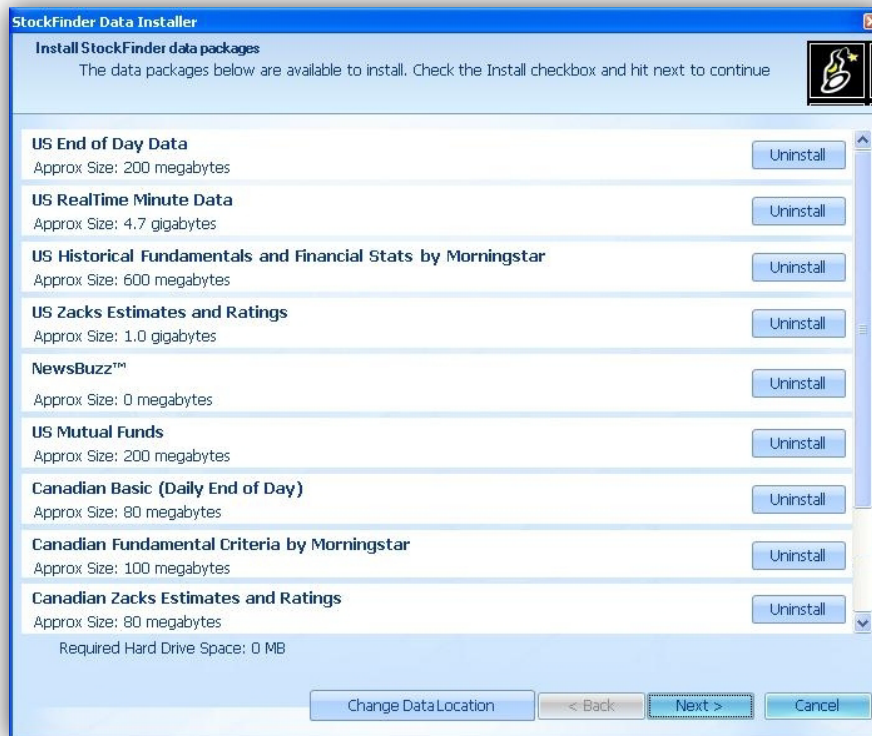
MANAGING DATA

Adding and Removing Data Types

To add or remove any data feed in StockFinder, click the *Settings Menu* and choose *Add/Remove Data*.

If any available Data Type has yet to be installed on your machine, its label reads *Install*. However, if a Data Type was previously installed, its label reads *Uninstall*.

StockFinder requires a restart to add/remove data feeds and will prompt you as to whether to continue with the process upon selection of the *Add/Remove Data* option within the *Settings Menu*. Select *Yes* when prompted to restart StockFinder.

Should you choose to continue with the add/remove data process, StockFinder restarts with a dialog box in which data feeds to add or remove can be selected. Simply click the *Install* or *Uninstall* button beside a data feed; then select *Next*. Some data feeds require an additional fee and require contact with Worden Sales to initiate (call toll free (800)776-4940). Click *Next* to complete the data installation and restart StockFinder.

Data Manager

The Data Manager can be initiated via *Settings Menu.* Select the *Data Manager* option to initiate that Data Manager dialog. It is within the Data Manager that you can control the maximum number of historical indicators bars to be displayed on any chart.
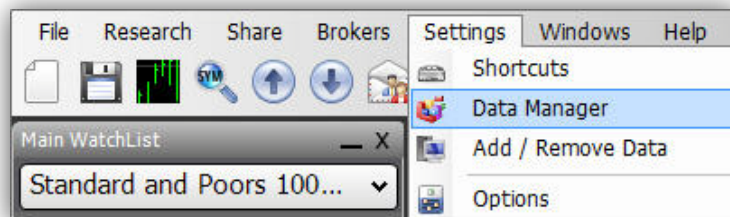
In the top of the *Data Manager* dialog is the *Data Source* list. Included list items are simply types of data that StockFinder must update and maintain as a background operation while you operate the software.
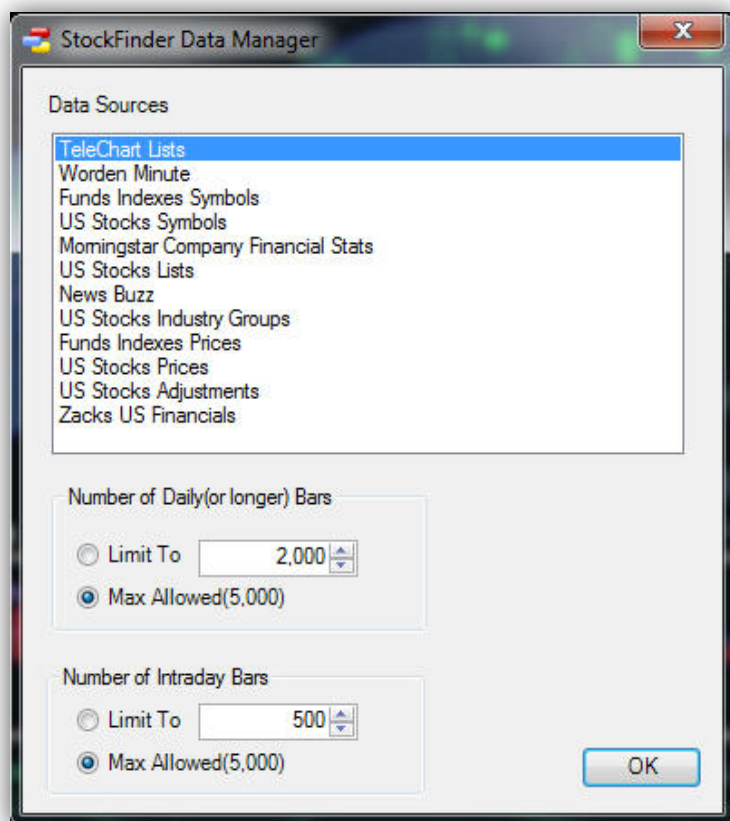
Below the *Data Sources* list is the area in which it is possible to designate the maximum number of historical indicator bars to be displayed on any chart within StockFinder.

Setting the Max Allowed to a lower value increases computer performance at the expense of less history. Setting the Max Allowed to a higher value may decrease performance speed. These values should be adjusted based on your specific computer and preferences.

Number of Daily (or longer) Bars
This field provides a defined limit to the number of Daily, Weekly, Monthly, etc. bars that may be displayed on a chart. Limit the bars to a specifically desired number using the *Limit To* setting.

If set to 1,000 (for example) the program will show a maximum of 1,000 bars of data when a chart's Bar Interval is set to *Daily, Weekly, Monthly, Yearly, etc.*

In a daily Bar Interval this will be 1,000 market days. In a weekly Bar Interval, it will use 1,000 weeks of data. The maximum number of bars allowed is 5,000.

Number of Intraday Bars
With a Platinum subscription, the *Number of Intraday Bars* option appears at the bottom of the *Data Manager* dialog. This option provides the same ability as the Number of Daily (or longer) Bars setting but applies to any Bar Interval with a granularity less than daily, such as Minute, Hourly, etc.

EXPORTING DATA

You may export indicator or condition data so that it can be stored or manipulated externally. Select *File | Export Data* to initiate the *Export Chart Data* dialog. Within this dialog, you may assign export path, what to export, export format, and amount of history to export.

Within the *Export Chart Data* dialog, assign desired settings; then select *Export*. The file(s) created will be stored in the location specified within the *Export Path* under the name assigned under *File Name.* The file(s) may be opened by any external application that is able to read and display data of the type specified.
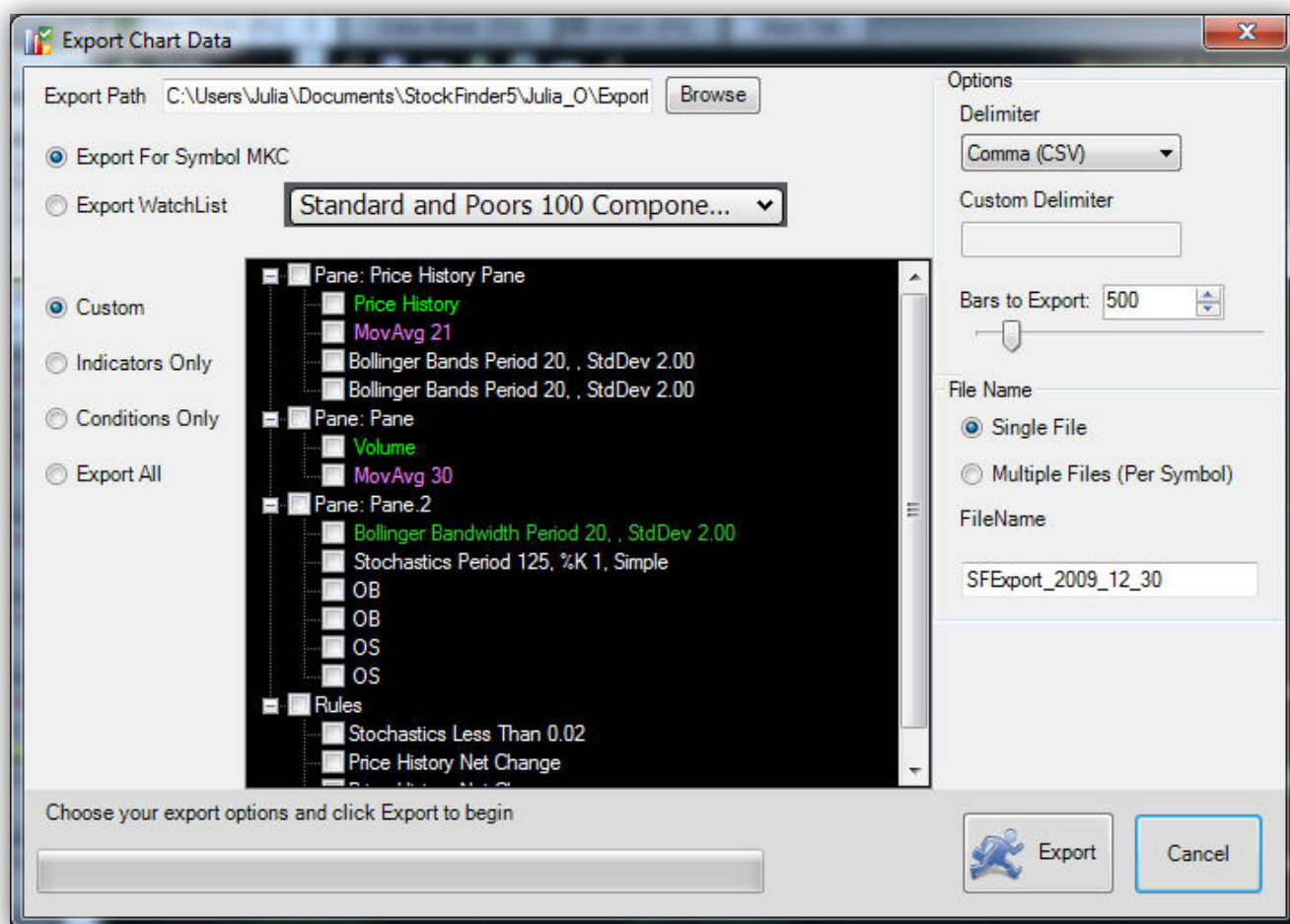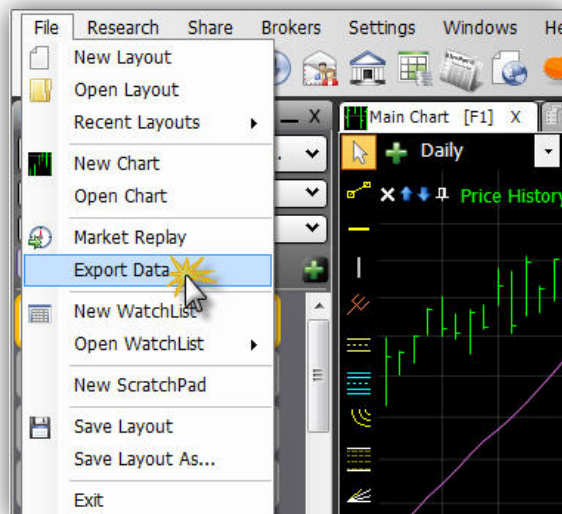
Terms to Know

Layout
The term Layout describes the totality of items open within StockFinder at a given time. These items may be floating, tabbed with one another, or docked into a specific screen position. The default Layout only contains a Main Chart, Main WatchList, and a Data Sheet window. You may work with Layouts that contain many items at a time – like several charts, more than one WatchList, BackScanner output, web browsers, ScratchPads, or even many StockFinder items spread out over a multi-monitor display. It does not matter how many items are included or how those items are arranged on your screen; as long as the analytical tools you're using are floated, tabbed, or docked within the same instance of StockFinder, all of the items are described as one Layout.

Chart
A chart is a grouping of indicators/plots. Charts always begin with a Price History plot and can have as many other indicators or plots added to them as are desired. Plots on a chart may be stacked on top of one another, contained within individual panes – they may also be overlaid, such that many (related or unrelated) plots are residents of the same pane. A chart always has its own toolbar, and its indicators are all controlled by the same Bar Interval and Zoom and Pan slider.

Bar Interval
The Bar Interval selected within the Bar Interval Selector of a chart at any time dictates how much information is included in each plotted bar of data on the chart. When the Bar Interval is set to 1 Day as is the default setting, Price History bars show 1 Day of trading information at a time. If this Bar Interval were changed to 1 Week, each bar shown on the chart would represent an entire week's trading activity. Each chart has its own Bar Interval.

Zoom and Pan Slider
This slider gives you control over how much historical information is displayed on a chart at a given time. To zoom out, so that you can see a lot of historical plotted values for your indicators, grab the left-most handle of the slider and drag it to the left. To stay zoomed in but look at a chart for past dates, grab the entire slider, and drag it to the left.

WatchList
A WatchList is any group of tickers that are displayed together as a list either in the Main WatchList window
or in a Personal WatchList window. The active symbol in the list is the one for which information will be displayed on all charts (that are not locked to display a specific ticker). Click any item within a WatchList to display its information on charts. WatchLists can be sorted by symbol, indicator value, stocks that are passing a scan, or many other criteria.

Indicator
An indicator is a graphical plot displayed within a chart's pane. Indicator values are displayed in increments determined by the Bar Interval assigned to the indicator's chart. StockFinder includes many technical and fundamental indicators, which can be manipulated in a variety of ways.

Market Indicator
A Market Indicator is an indicator whose job it is to calculate some value across a list of issues (as opposed to a single stock or Exchange Traded Fund). A Market Indicator can be built based on a single indicator from a chart - or - can be based on a condition.

Condition
A condition is a user-defined entity that describes a specific behavior for an Indicator. A condition can be used to identify stocks that are actively or have historically exhibited the behavior defined by the condition. A condition can also be used to highlight historical instances of the described behavior by painting a plot like Price - or can be used in a BackScan to aggregate historical trade information for a specified condition-based strategy.

Combo Condition
A combination condition is made up of more than one individual condition; individual conditions are combined using AND or OR logic, such that a combination condition either requires that each conditional behavior included be exhibited simultaneously (AND) - or - requires that any conditional behavior included can be met in order for the condition to pass (OR).

Sequence Condition

A sequence condition is made up of more than one individual condition; individual conditions are arranged in the chronological order in which they must occur (within a specified time span) in order for the entire sequence condition to be met.

Paint Scheme

A Paint Scheme is a savable conditional color scheme that can be applied to any indicator. Some common Paint Schemes - such as green and red Price bars - are included in StockFinder by default. Additional Paint Schemes may be created and saved based on any user-defined logic.

RealCode Indicator

An indicator is a graphical plot displayed within a chart's pane. Indicator values are displayed in increments determined by the Bar Interval assigned to the indicator's chart. StockFinder includes many technical and fundamental indicators, which can be manipulated in a variety of ways. A RealCode indicator is a savable user-generated indicator whose logic is written using RealCode.

RealCode Condition

A condition is a user-defined entity that describes a specific behavior for an Indicator. A condition can be used to identify stocks that are actively or have historically exhibited the behavior defined by the condition. A condition can also be used to highlight historical instances of the described behavior by painting a plot like Price - or can be used in a BackScan to aggregate historical trade information for a specified condition-based strategy. A RealCode condition is a savable user-generated condition whose logic is written using RealCode.

RealCode Paint Scheme

A Paint Scheme is a savable conditional color schemes that can be applied to any indicator. A RealCode Paint Scheme is a savable user-generated Paint Scheme whose logic is written using RealCode.

Linked WatchList Column

A WatchList can be sorted by various criteria that are added to the WatchList as columns. A sort column added to a WatchList from a particular chart will be added to the WatchList as a Linked WatchList Column by default, which means that its bar interval is tied to the bar interval of the chart from which its information was derived. This applies to conditional or indicator WatchList columns. A Linked WatchList Column can always be modified so that it becomes an Unlinked WatchList Column.

Unlinked WatchList Column

An Unlinked WatchList Column has a static, assigned bar interval, as opposed to its bar interval being tied to the bar interval of a chart. The information displayed in an Unlinked WatchList Column does not update based on changes to the bar interval of any specific chart; its bar interval and update intervals are based on its assigned properties.

Scan

To Scan is to apply a condition to a list of issues (stocks, ETFs, etc.) in order to identify those - if any - that meet the behavioral criteria of the condition. Scanning places a condition light on any item in a WatchList that currently meets the behavioral criteria of the condition. If no items in the list meet the condition at the time of the Scan, the items in the list are ordered chronologically, with those that most recently did pass the condition displayed at the top of the list.

Sort

To Sort is to order the issues (stocks, ETFs, etc.) in a WatchList by some assigned criteria. WatchLists may be sorted by indicator-derived values or condition-derived values.

Filter

To Filter is to limit a list of issues (stocks, ETFs, etc.) based on one or more conditional criteria. WatchList items that do not meet the defined conditional criteria at the time of the Filter are not displayed in the WatchList window.

Active Symbol

The *Active Symbol* is ticker symbol for which information is displayed on all charts (that are not locked to display a specific ticker).

Layouts

WHAT IS A LAYOUT?

The term Layout describes the totality of items open within StockFinder at a given time. These items may be floating, tabbed with one another, or docked into a specific screen position. The default Layout only contains a Main Chart, Main WatchList, and a Data Sheet window.

You may work with Layouts that contain many items at a time – like several charts, more than one WatchList, BackScanner output, web browsers, ScratchPads, or even many StockFinder items spread out over a multi-monitor display.

It does not matter how many items are included or how those items are arranged on your screen; as long as the analytical tools you're using are floated, tabbed, or docked within the same instance of StockFinder, all of the items are described as one Layout.

DEFAULT LAYOUT

The StockFinder5 default Layout includes the Main Chart, Data Sheet, and Main WatchList windows.

The Main WatchList is located along the left-hand side of the Layout; the Main Chart, Data Sheet are tabbed within the Main Charting area.

Any of these windows may be minimized or deleted using their minimize and close options (- and **x**), respectively.   Note that these options will appear in different locations depending on the window of interest.

Main Chart (or any other tabbed window)- displays a minimize option in the top-right corner of the window and a delete/close option in the window title bar, directly adjacent to the name window's assigned name.   Either of these options removes the window from sight within the Layout.   A minimized or deleted Main Chart can always be restored to the Layout via the *Windows* menu.

Main WatchList - displays a minimize and delete/close option in the top-right corner of the window.   Either of these options removes the Main WatchList from sight within the Layout.   A minimized or deleted Main WatchList can always be restored to the Layout via the Windows menu.

> **Note: A minimized window may be restored via the Windows menu or its icon, located within the *Minimized Items* area, located at the very bottom of the StockFinder screen.   The *Minimized Items* area is pictured in the graphic below.**
>
>
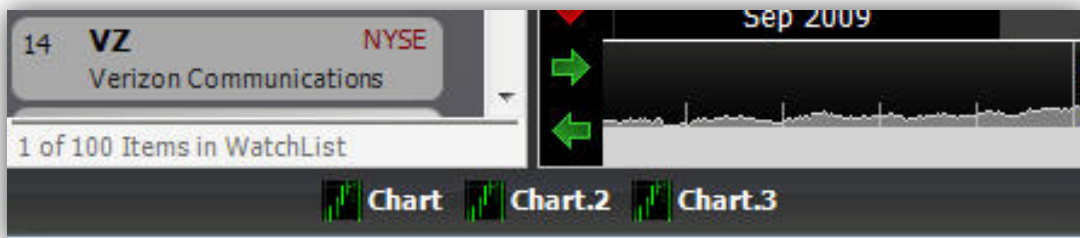
CUSTOMIZING A LAYOUT

Adding Elements to Layout

Beginning with the default Layout, it is possible to customize a Layout to include additional charts, additional WatchList windows, BackScanner windows, web browsers, ScratchPads, or any combination of these windows spread out over a multi-monitor display.

Adding a Chart to a Layout

A blank chart template can be added to a Layout by selecting the *New Tab* button located to the far-right of any tabbed items in the charting area.   The *New Tab* button is pictured in the graphic below.   A blank chart template includes only a Price History and its Moving Average.   A blank chart template can also be added using the *File | New Chart* menu option.
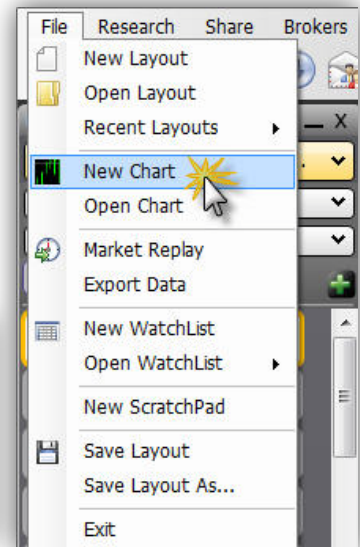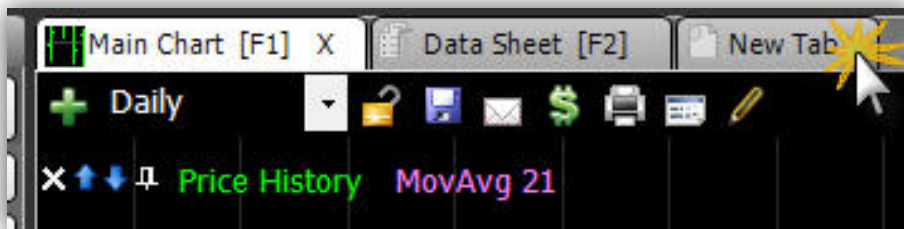
A previously saved chart template can be added to a Layout using the *forward slash key (/)* on your keyboard.   Type (/); then begin typing the name of any previously saved chart to locate the desired chart.   Once located, double-click the desired chart from the list, and it will be added to the current Layout as a tabbed item.   You may also add a previously saved chart template using the *File | Open Chart* menu option.
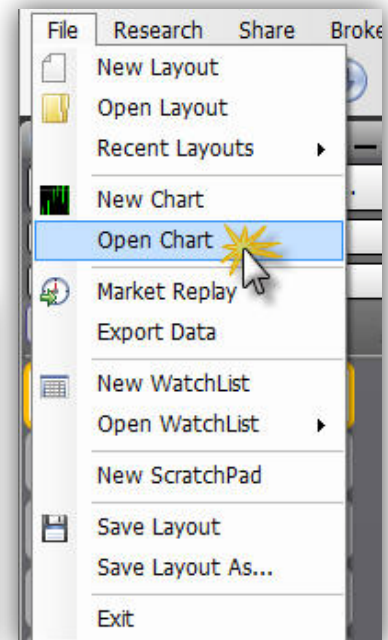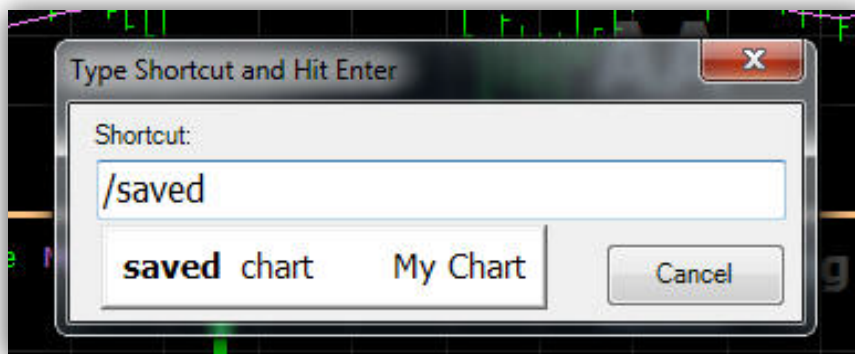
Adding an Additional WatchList Window to a Layout

A previously saved personal WatchList window can be added via *File | Open WatchList*. The selection of a previously saved personal WatchList from this location is assigned a location (docked) beneath the Main WatchList by default but can be moved to any other location within the Layout using the standard window placement procedures. See the *Docking* section of this reference for more information.
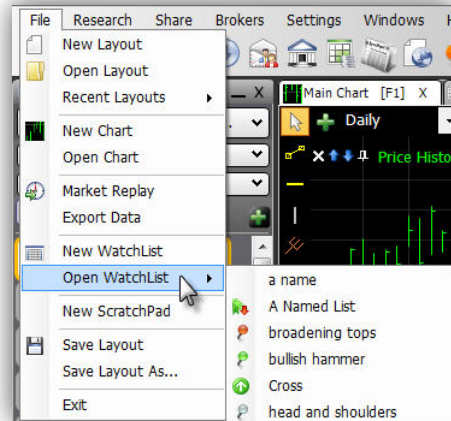
Adding a BackScanner Window to a Layout

A BackScanner window can be added to a Layout using the *Open New BackScan* button located on the QuickAccess menu. A BackScanner window may also be added using the *Windows | New BackScanner* menu option. A new BackScanner window is added to a Layout as a floating window and can be docked (locked into the position of your choosing). See directions for docking windows below.
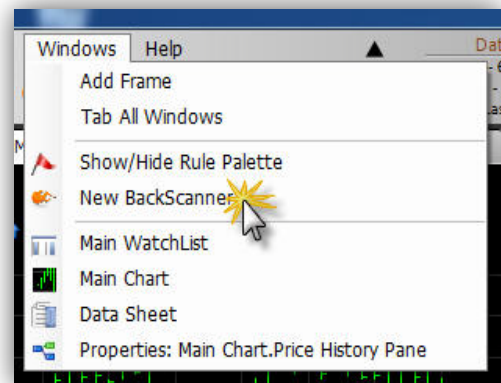
Adding a Web Browser Window to a Layout

A Web Browser window can be added to a Layout using the *Add Web Browser* button located on the QuickAccess menu.

Adding a ScratchPad to a Layout

A ScratchPad (small word processing window) can be added to a Layout using the *File | New ScratchPad* menu option. A new ScratchPad will be added to a Layout docked beneath the Main WatchList.
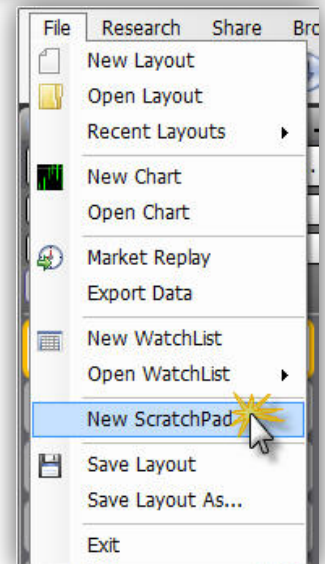
Positioning Elements within a Layout

Any window within a Layout can be docked (locked in place) relative to any other window in a StockFinder Layout.   When added to a Layout, some windows are docked into place by default.   Any window - even if docked by default - can be docked into a new position or may be assigned to float freely.   When choosing where to place a window, there are three considerations to keep in mind.

1. Any window may be assigned to float, which means that it will have no designated spatial relationship to any other window on the screen.   If a window is floating, it can be dragged anywhere on an active monitor by clicking its title bar with the mouse and dragging while the mouse is depressed.
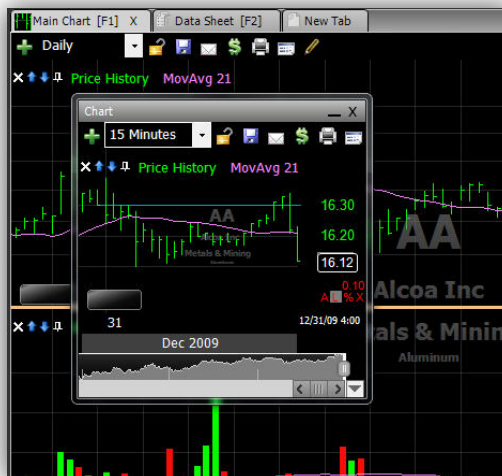
2. Any window may be assigned to be tabbed behind any other window.   If two windows are tabbed, only one tab's content will be visible at a time.   To view the other tab's content, select the tab name for the desired tab, and its content will be displayed.   In order to tab a window behind another, right-click the title bar of the window to be tabbed, and select the desired tab destination from the *Tab With* menu option.
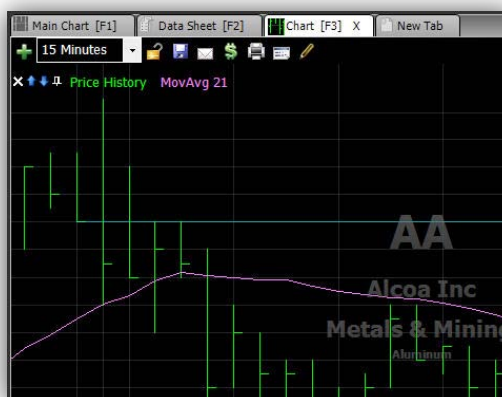
3. Any window may be docked into relative position above, below, or beside any other window on the screen. In order to dock a window relative to another, right-click the title bar of the window to be docked, and select the desired docking destination from the *Dock* menu option.

Utilizing a Multi-Monitor Display

A Layout may stretch across multiple monitors.   Each monitor in use may contain floating windows or may contain frames, which chart windows, etc. may be docked into.   Once created, a frame may be minimized, maximized, and deleted independent of the original StockFinder frame.   In order to create an additional frame for a Layout, use the *Windows | Add Frame* menu option. In order to add the first desired window to the new frame, click the title-bar of the desired window, and drag the mouse into the gray area of the new frame.   When released, the window will be expanded to fill the entirety of the space allotted for the new frame.   You can then dock any other window relative to the window already docked within the new frame.
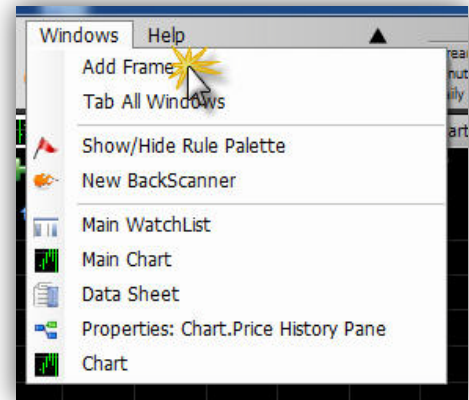
SAVING AND RETRIEVING A LAYOUT

Any Layout can be saved at any time.   Saving a Layout essentially saves a template of all of the windows you chose to add to the Layout.   Any and all Layout windows will be saved in assigned positions with assigned content.   For example, saving a Layout saves all included charts, indicators on those charts, conditions included on those charts, WatchLists with any assigned columns, etc.   To save a Layout, either select the *Save Layout* button located on the QuickAccess Menu, or use the *File | Save or Save As* menu options.
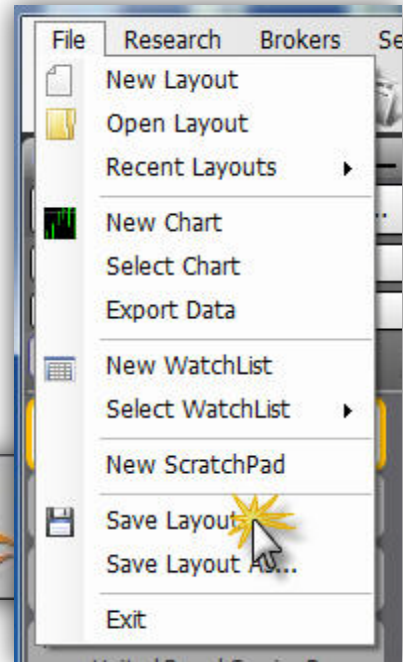
To retrieve a previously saved Layout, use the *File |Open Layout* menu option, or type (/) and begin typing the name of the desired previously saved Layout.   Once located, double-click the desired Layout, and you will be prompted to save the contents of the currently active Layout before the saved Layout opens to take its place.
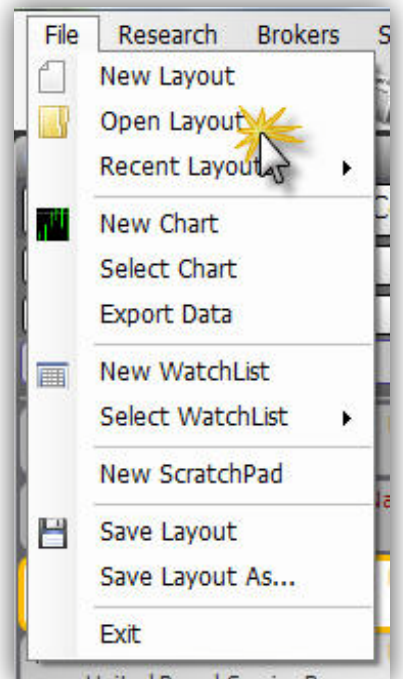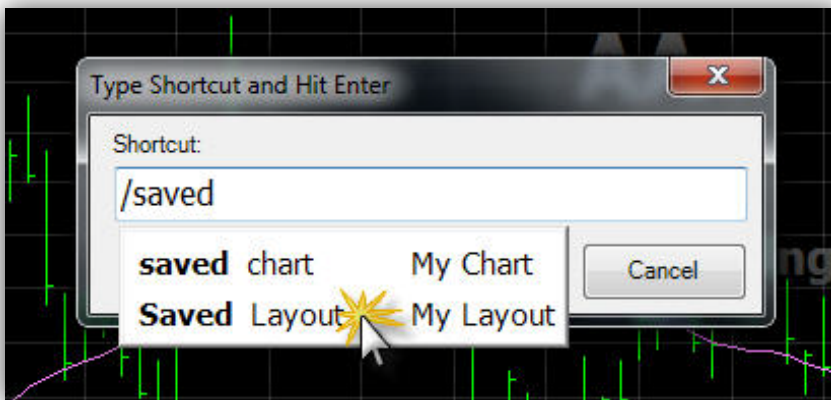
Note: Saved Layouts are saved to the following file directory on your computer:
Documents\StockFinder5\YourUsername\MyLayouts

WatchLists - Your Organization Tool

In This Section...

WHAT IS A WATCHLIST?
SORTING A WATCHLIST
TELECHART WATCHLISTS AND SYNCHING SYMBOLS
CREATING AND DELETING A WATCHLIST
ACTIVE SYMBOL

WHAT IS A WATCHLIST?

A WatchList is any group of tickers that is displayed together as a list either in the *Main WatchList* window or in a *Personal WatchList* window. Some WatchLists are created and maintained for you and are instantly available via the *WatchList Selector Drop-Down* menu. These lists include indices, industries, Exchange Trade Funds, ETF components, etc.

Selecting a WatchList

To view the contents of a specific WatchList, click the *WatchList Selector Drop-Down*, and either select the desired list name or begin typing to limit the list based on keyword.
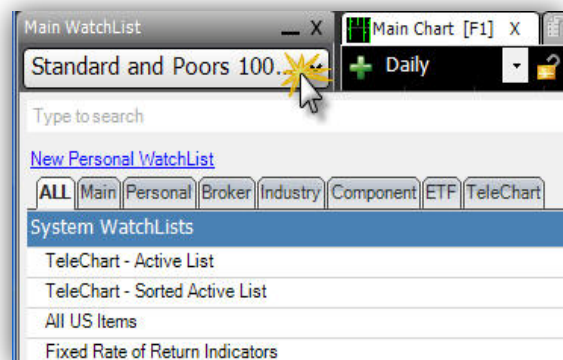
WatchList Menu Categories

At the top of the WatchList menu are the categories into which the WatchLists fall. Click any category tab to choose a WatchList within that category. Then select the desired WatchList name to display its members.

Category definitions:

All -- a list of all the WatchList in StockFinder
Main--the primary WatchLists in StockFinder (e.g. US Stocks, Canadian Stocks, Morningstar Industry Groups, etc.)
Personal--WatchLists created by the user
Broker--WatchLists connected to the brokerage account being traded through StockFinder (e.g. Current positions)
Industry--industry and sub-industry lists for US Market
Component--major component indexes (e.g. S&P 500; Nasdaq 100; etc)
ETF--component lists of Exchange Traded Funds
TeleChart--all WatchLists created in Worden's TeleChart 2007 Software (only available to TeleChart subscribers)
Canadian Industry Groups--industry and sub-industry lists for Canadian Market (only available to Canadian data subscribers)
Fund Category--mutual funds separated into category lists (only available to StockFinder for Mutual Fund subscribers)
Fund Family--mutual funds separated into family lists (only available to StockFinder for Mutual Fund subscribers)

SORTING A WATCHLIST

WatchLists can be sorted by symbol, indicator value, or condition.   Any of these sorts can be performed in ascending or descending order.

Sorting by Symbol

Left-click the *Symbol* column header located in the WatchList header area.   The initial sort order will be ascending, from A to Z. To change the sort order to descending, left-click the Symbol column header once more.
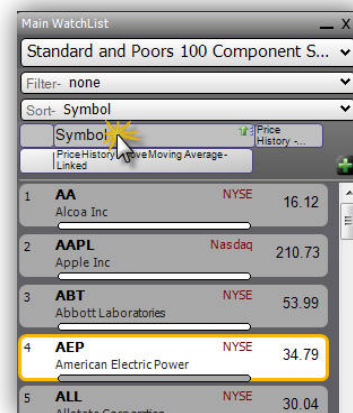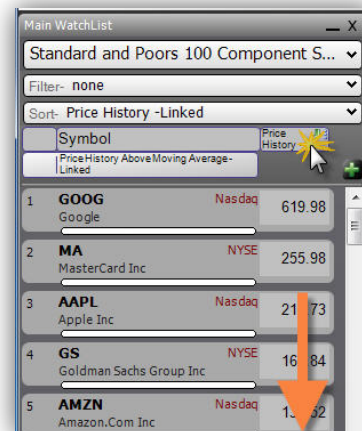

Sorting by Indicator Value

Any displayed indicator can be used to create a sort column within a WatchList.   A sort column created in this way will order the items in the WatchList by the current value of the indicator used to create the column.   Right-click any displayed indicator and choose *Sort by* from the menu provided.   This creates a temporary sort column which will be replaced the next time you request a temporary sort column for any reason.   The same type of temporary column can be created by dragging any displayed indicator into a WatchList area.   Select *Sort* from the menu provided.
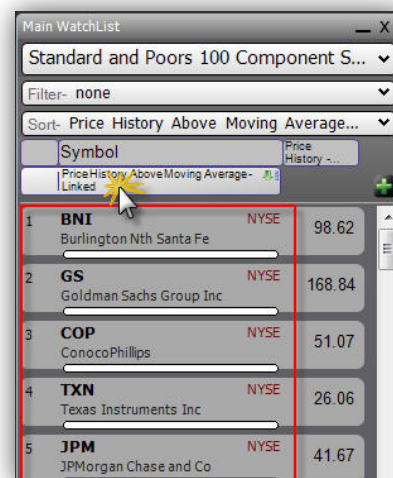

To create a permanent (until you delete it) sort column for an indicator, select the *Add Column* button located in the top-right corner of the WatchList header area.   Manually locate the desired indicator from the list or type the name of the desired indicator to limit the list of available indicators by keyword.   The column created represents the current value of the selected indicator for each item in the list.   This column will not be sorted by default.   To sort the list, left-click the column's header.   To change the sort order, left-click the column's header once more.

Sorting by a Condition

Any unsaved condition from a chart may be used to sort a WatchList, identifying the items in the list that pass the condition.   Drag a condition from the chart into the symbol area of a WatchList.   Select either *Sort* or *Condition Column* from the menu presented.   *Sort* creates a temporary sort column which will be replaced the next time you request a temporary sort column for any reason.   *Condition Column* creates a permanent (until you delete it) column with lights that identify the items in the list that pass the condition.

A previously saved condition can be used to create a sort column within a WatchList as well.   If the saved condition is visible on an active chart, you may use the method described above to create a sort column.   If the previously saved condition is not currently

visible on a chart, select the *Add Column* button located in the top-right corner of the WatchList header area.

Manually locate the desired condition from the list or type the name of the desired condition to limit the list of available conditions by keyword.   The column created identifies the items within the list that pass the selected condition.   The column created is a permanent column (until you delete it).

Note: a WatchList sorted in descending order by a condition identifies those items within the list that currently pass the condition with a light that matches the color of the condition.   Items within the list that do not currently pass the condition are listed in order of the item that most recently did pass the condition but no longer does.   This ensures that while some items in the active list may not currently pass the conditional criteria you've identified, you'll be able to easily identify those that most recently exhibited the behavior.

TELECHART WATCHLISTS & SYNCHING SYMBOLS

Accessing TeleChart WatchLists in StockFinder

To access in StockFinder any WatchList created in TeleChart, click on the WatchList Selector Drop-Down and choose the category tab labelled TeleChart. This will display in StockFinder a list of all the WatchLists currently available in TeleChart. Click the desired WatchList name to make it your active WatchList in StockFinder.

TeleChart Active WatchList

To synchronize the WatchList between Worden's TeleChart 2007 and StockFinder software packages, click on the WatchList drop-down and choose TeleChart - Active List as the WatchList selection. The last WatchList used in TeleChart will now be the active WatchList in StockFinder.

TeleChart Sorted Active List

To synchronize the WatchList and Sort between Worden's TeleChart 2007 and StockFinder software packages, click on the WatchList drop-down and choose TeleChart - Sorted Active List as the WatchList selection. The last WatchList used in TeleChart will now be the active WatchList in StockFinder and sorted as it last was in TeleChart.

Symbol Synch

When using the *TeleChart - Active List* or *TeleChart - Sorted Active List* as the WatchList in StockFinder, the current active symbol selected in StockFinder is synchronized to the active symbol in TeleChart.
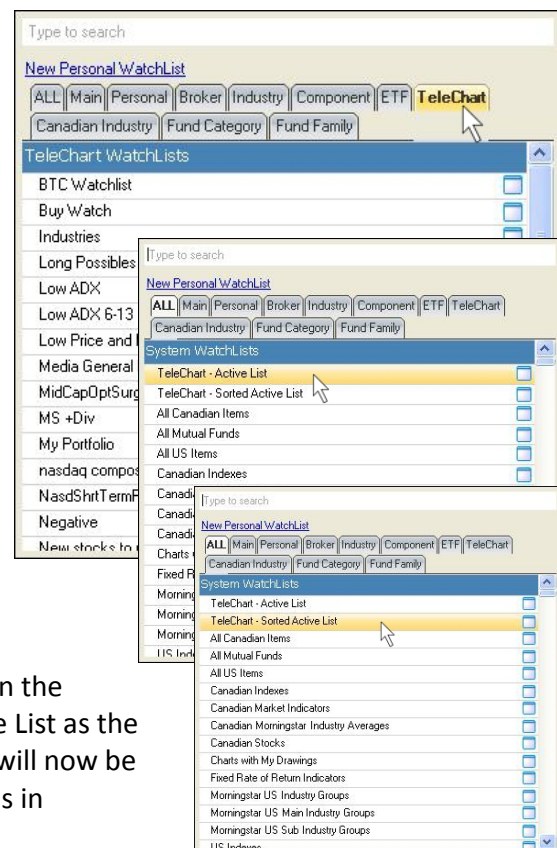
CREATING AND DELETING A WATCHLIST

Creating a WatchList

You may create personal WatchLists, which may contain any symbols included in the Worden database. A new blank WatchList can be created using the *File | New WatchList* menu option. A new blank WatchList can also be added by selecting the *New Personal WatchList* option within the *WatchList Selector Drop-Down* area.

In either case, creating a new WatchList initiates a prompt to name the list. Provide a name when prompted, and if desired, an image that represents the list. You can then add symbols to the new list in one of three ways.
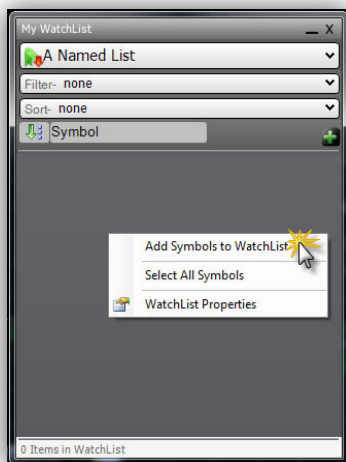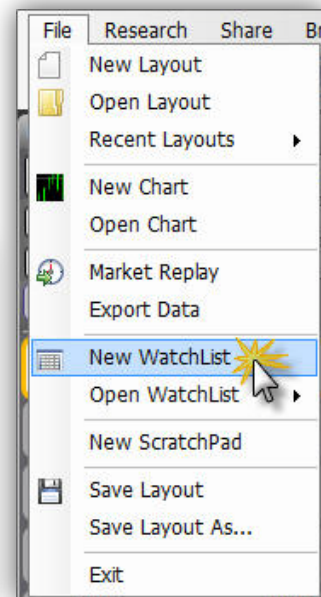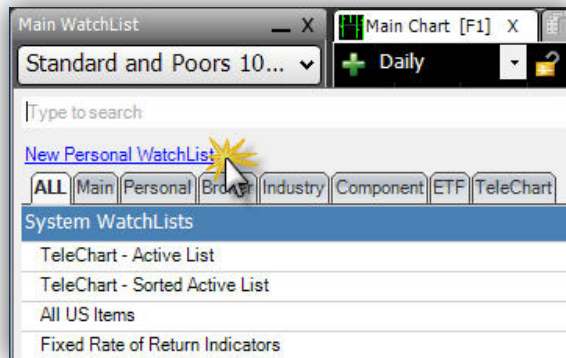
1. Right-click within the background of the new WatchList and select the *Add Symbols to WatchList* menu option. If you choose this method, begin typing a symbol or company name and choose the desired symbol from the resulting list.
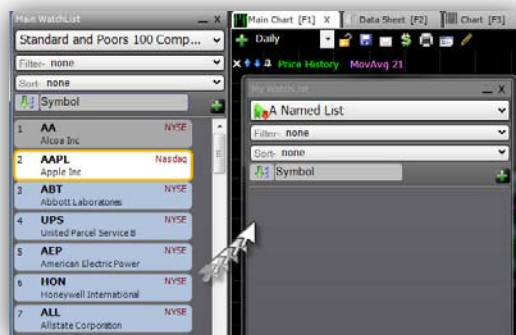
**2.** Drag a symbol or list of symbols from the Main WatchList (or some other personal WatchList) into the new WatchList background area.

3. Right-click within the background of the new WatchList and select *Paste* in order to paste a list of symbols that were copied from a different StockFinder WatchList or from some other copy-paste enabled computer application.
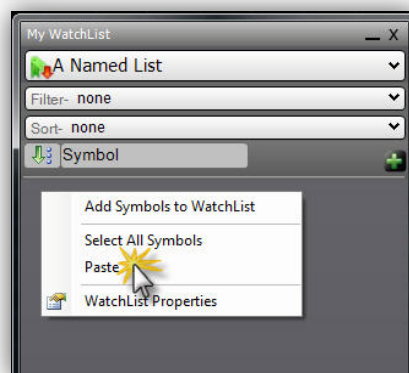
Deleting a WatchList

Any personal WatchList you create can be deleted at any time. To delete a personal WatchList, select the *WatchList Selector Drop-Down*, and from the *My WatchList* section, select the *Delete* button associated with the desired list.
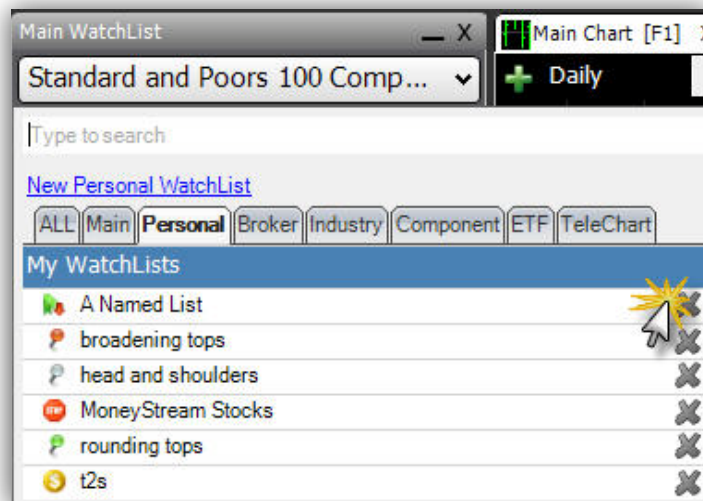
ACTIVE SYMBOL

The active symbol in a WatchList is the one for which information is displayed on all charts (that are not locked to display a specific ticker). Click any item within a WatchList to display its information on current charts or other symbol-specific windows.

If you have used the locking function on any chart, you have chosen for that chart to only display information for the symbol that was active when the locking action was initiated. Therefore, the Active Symbol will no longer apply to that chart.

For a more complete the Active Symbol concept, please refer to the *Controlling the Active Ticker Symbol* section of this reference.

Charting

CONTROLLING THE ACTIVE TICKER SYMBOL

You have several operational choices when assigning the Active Ticker Symbol. Each is described below.

Jumping to a Symbol

Typing Shortcut

To jump to any ticker symbol in the system, simply start typing any part of the symbol or company name. The smart search feature will narrow the list to only those items containing the letters typed. To jump to the desired chart, type the complete symbol and press the enter key or click on the symbol or company name when it appears in the smart search list.

Optional J key

For TeleChart users who may be accustomed to and wish to use the "J" key to get the "Jump to" dialog box, you may set up that option in StockFinder via *Settings Menu | Options*. Place a check in the check-box next to "*Use TeleChart style jump to (J Hotkey)*".
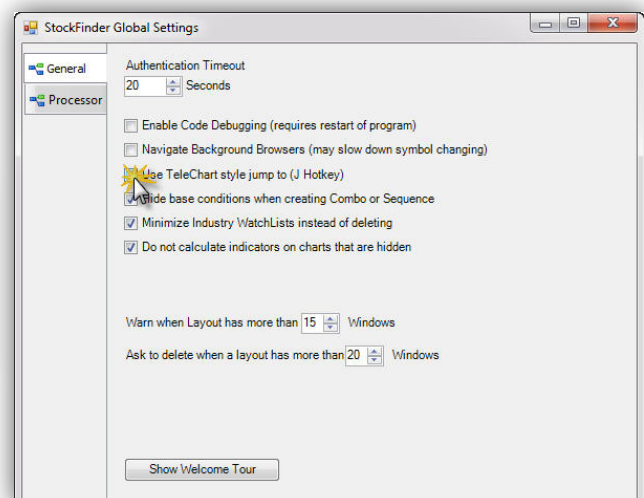
Assigning Symbol Using Main Menu Option

Another way to jump to a new symbol is to choose the Change Symbols (spyglass) Quick Access Menu icon to initiate the Jump To Symbol dialog. To jump to the desired ticker symbol, type all or part of the symbol or associated company name; press the Enter key or select the symbol or company name when it appears in the smart search list.
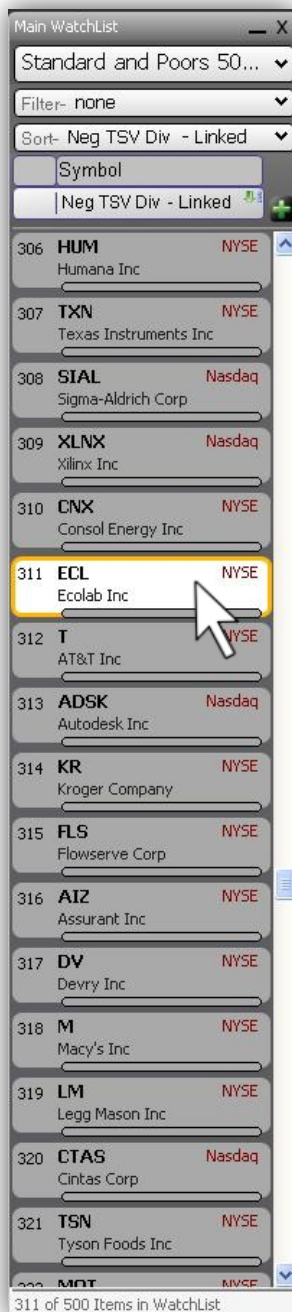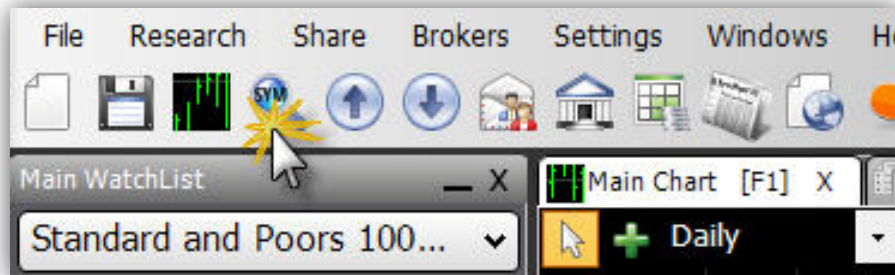
Using the Spacebar to Navigate

Press the spacebar on the keyboard to navigate sequentially through a WatchList, assigning a new Active Symbol with each new selection from the WatchList. Hold down the Control (Ctrl) key and press the spacebar to move backward through the WatchList.

Manually Selecting a Symbol from a WatchList

Click any symbol in any WatchList to display information for the selected symbol on any non-locked chart and for any other symbol-specific windows that may be open in the Layout at the time of selection.

CHART DISPLAY SETTINGS

Price Graph Type

Price information can be displayed in any of eight different styles, which are described individually below.   Left-click the Price plot, and select the *Plot Style Drop-Down* in order to assign a style to the Price plot.   All of the following descriptions assume the scale of the price plot is not inverted.
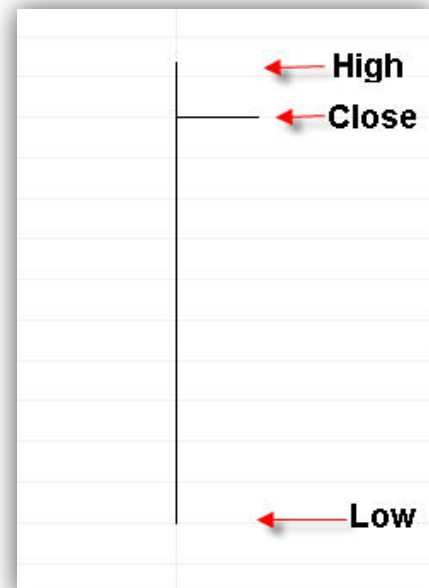
HLC Bar

The Price plot has four components available for each time increment: Open, High, Low, and Close.   The *HLC Bar* plot style only displays three of the available pieces of Price information for each date or time: High, Low, and Close.   For each historical date, the HLC Bar draws a vertical line connecting the Price High and the Price Low for the date.   A right-facing tick or hash is then drawn at the level of the Price Close for the date, as labelled in the graphic below.

OHLC Bar

The Price plot has four components available for each time increment: Open, High, Low, and Close.   The *OHLC Bar* plot style only displays all four of the available pieces of Price information for each date or time: Open, High, Low, and Close.   For each historical date, the OHLC Bar draws a vertical line connecting the Price High and the Price Low for the date. A left-facing tick or hash is drawn at the level of the Price Open for the date, and a right-facing tick or hash is then drawn at the level of the Price Close for the date, as labelled in the graphic below.

Candlestick

The Price plot has four components available for each time increment: Open, High, Low, and Close. The *Candlestick* plot style displays all four components of Price for each historical date.

A candlestick may either be opaque or transparent. An opaque candlestick represents the four Price components as labelled in the graphic below. A transparent candlestick represents the four Price components as labelled in the graphic below.
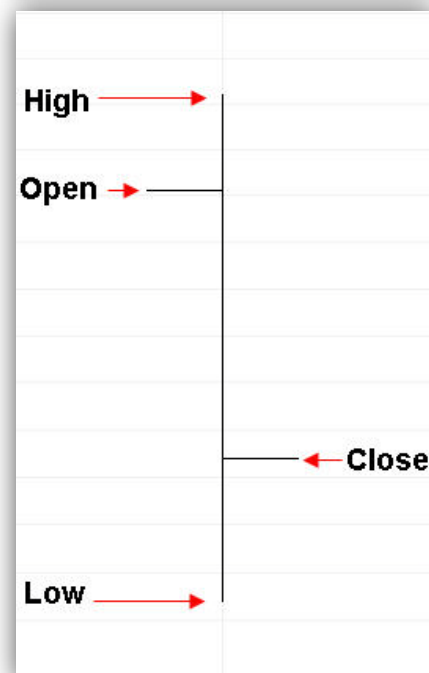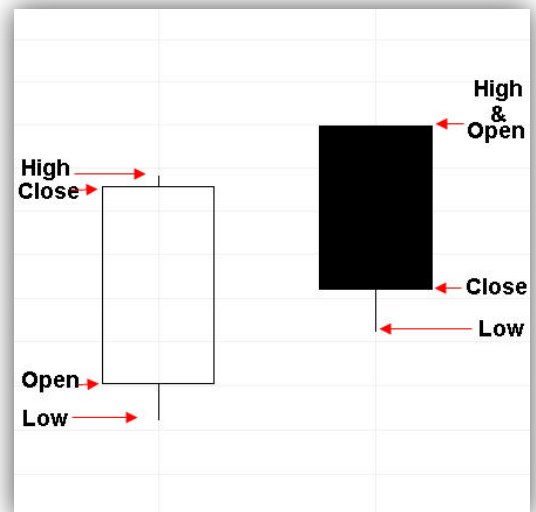

Line

The Price plot has four components available for each time increment: Open, High, Low, and Close. The *Line* plot style draws a point at the Price Close value for each date, as illustrated in the graphic below. Each point is then connected by a line to the next point on the chart. The connecting line has no data behind it; the line's only purpose is to connect the values of sequential data points.

Bar

The *Bar* plot style is typically used to display non Price data (i.e. indicator values) in a specific style. The Bar plot style draws a solid column from zero to the indicator value for each date or time, depending on the time-period increment. Time-period increment is determined by the bar interval assigned to the chart.

Point and Figure

The *Point and Figure* plot style is currently in line for revision and should not be used until it is revised. When new builds are released, check the Patch Notes for mention of a revised Point and Figure plot style.
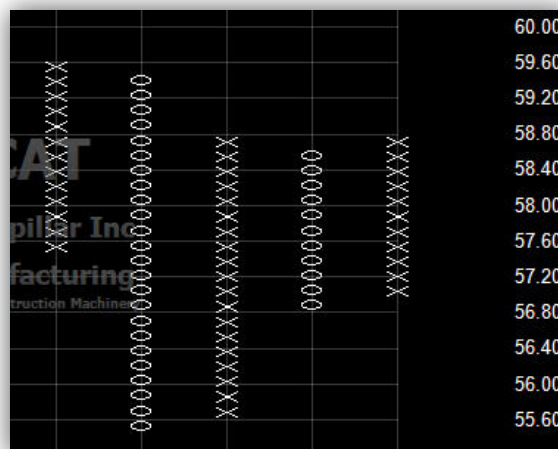
Shade Region

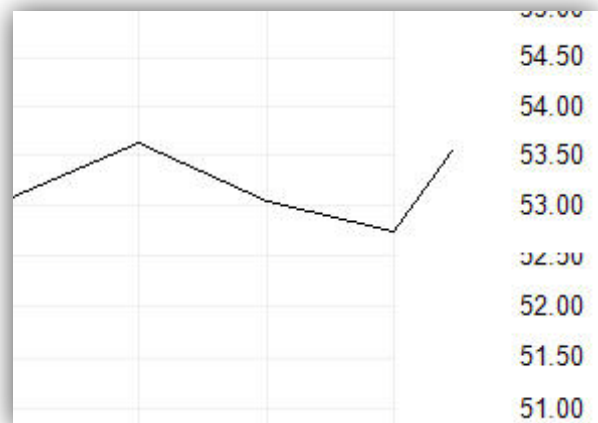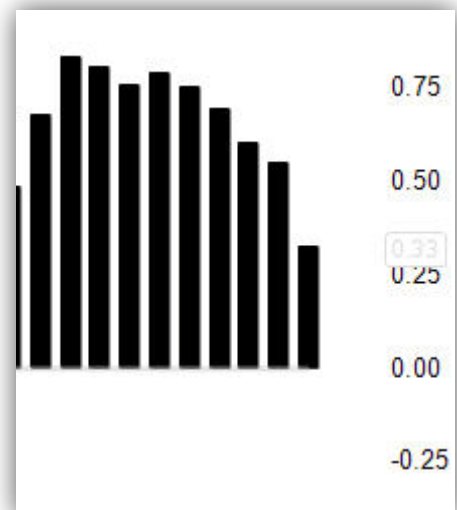The Price plot has four components available for each time increment: Open, High, Low, and Close. The *Shade Region* plot style draws a point at the Price Close value for each date. Each point is then connected by a line to the next point on the chart, much like the Line plot style. The Shade Region plot style then fills the are above or below the Close line, as illustrated in the graphic below.
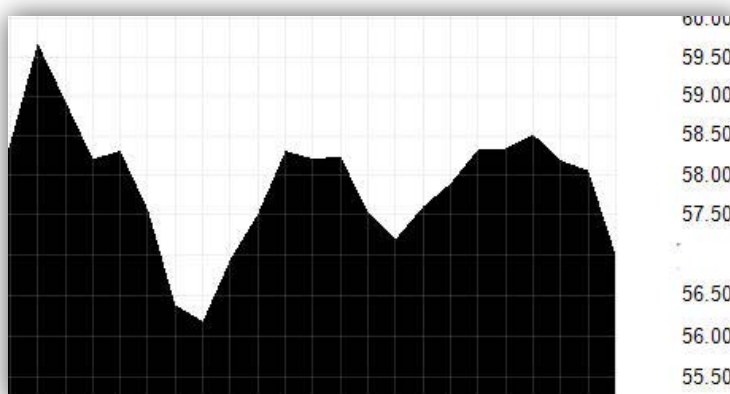
Shape

The *Shape* plot style uses shapes to mark the Price Close (Last) for the plot. It is similar to the *Line* style without a connection between each data point. The *Shape* style is illustrated in the graphic that follows.

Chart Bar Interval

The *Bar Interval Selector* menu sets the amount of time associated with each bar. If set to *1 Day* the chart will plot a daily chart with one trading day assigned to each bar. All of the Bar Intervals in StockFinder are calendar based. As a result, a weekly chart assigns one trading week to each bar (some bars may not contain five days of trading if there was a market holiday).

To the right of every Bar Interval on the list is the hotkey associated with that Bar Interval. Pressing the hotkey on the keyboard changes the Bar Interval of the chart. For example, press the 1 key on the keyboard to change to a daily chart. Press the 5 key to change to a weekly chart. Platinum users will notice intraday Bar Intervals in the picker.
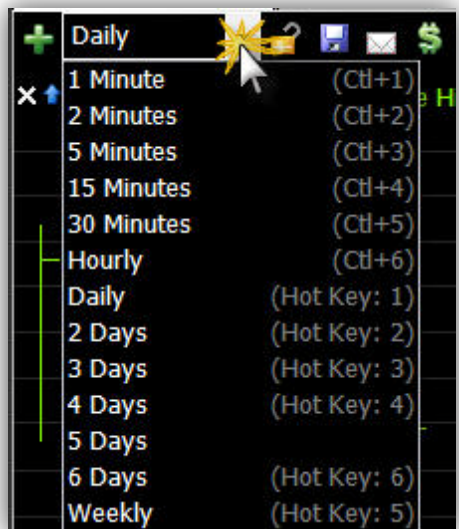
These have two-key combinations for their hotkeys. Hold the *CTRL* key and press 1 to make a 1-minute chart.

At the bottom of the picker is the *Edit* option. Clicking it brings up the *Bar Interval Properties* window. At the top is the option of displaying Bar Intervals as either a pull-down list (the default) or as a series of tabs along the top of the chart. Select any Bar Interval on the list and click *Remove* to eliminate that Bar Interval from the list.

Select *Add* to create a new Bar Interval. Clicking *Add* brings up the *Add Bar Interval* window. Choose the time denomination (day, week, month, etc) and the number (1,2, etc). For a 5-day chart set this to 5 and *Day*. Platinum users have the option of making the Bar Interval streaming or not. Click *OK* to add the new Bar Interval to the list.
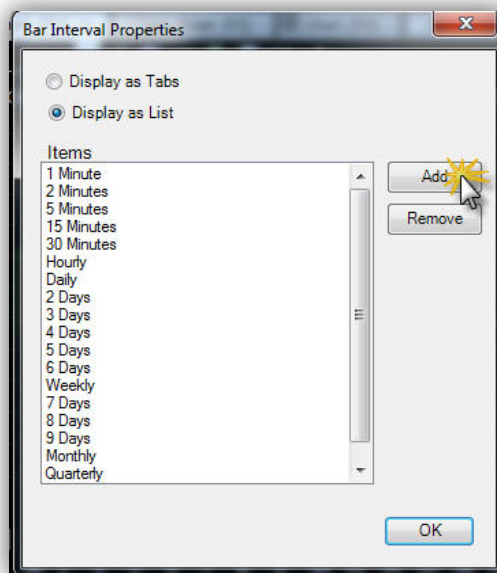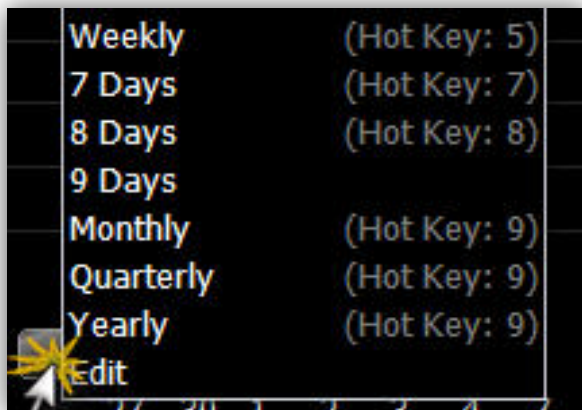
Chart Scaling

All indicators have scales – both horizontal and vertical. An indicator is nothing more than a series of points plotted along corresponding horizontal and vertical coordinates.   Both the horizontal (date scale along the bottom of the chart) and the vertical (values of the plot) scales contribute to the way the indicator's values are displayed on the chart.   You have control over many scale display characteristics.   To access the properties of a scale display, click the scale for the plot and select Edit. Below is a graphic that depicts the *Scale Editor* dialog.   For explanations of each characteristic, see below.
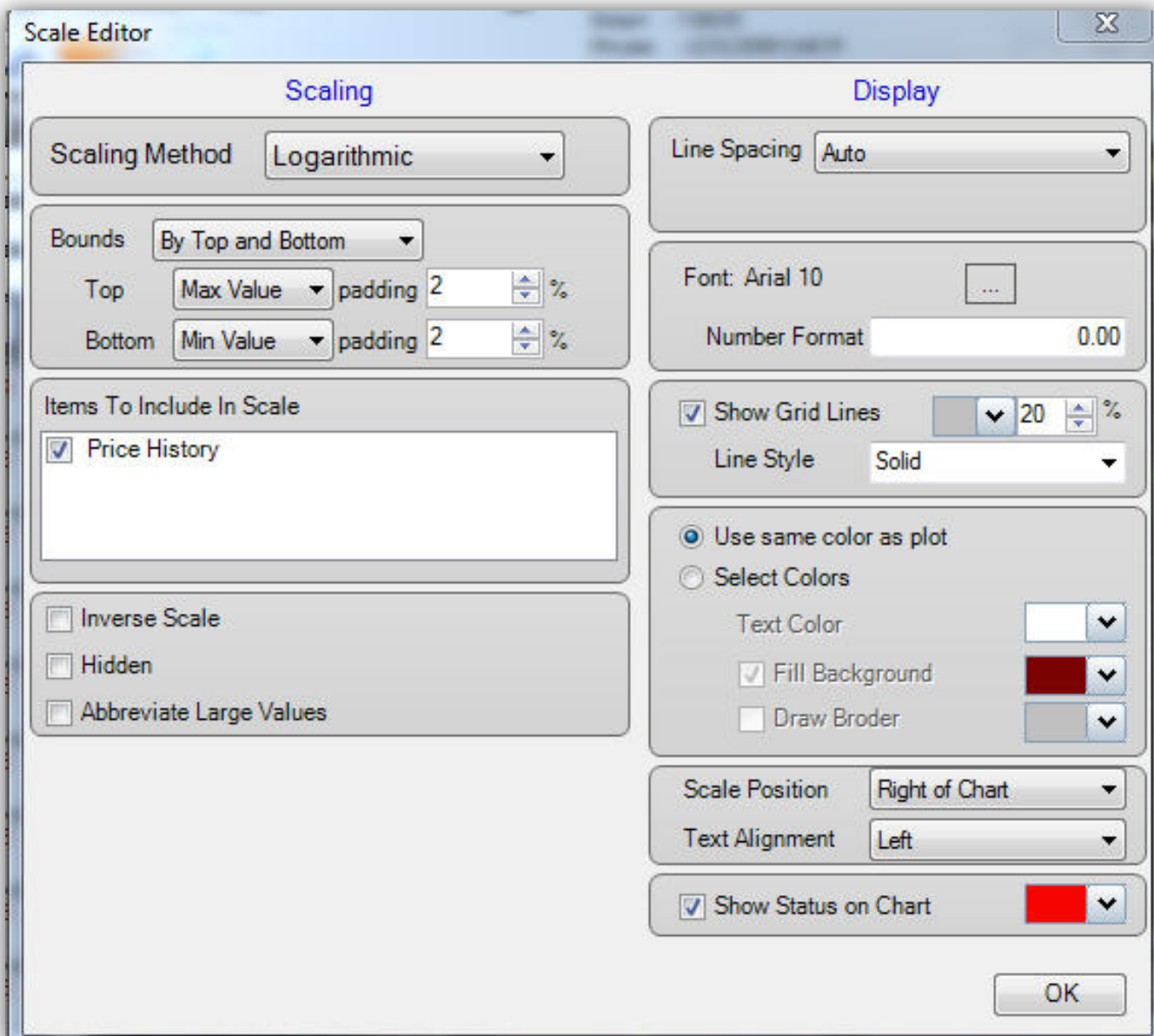
Scaling Method

The first characteristic of a scale that can be altered is the Scaling Method. There are three Scaling Methods available for charts:

Arithmetic – Each scale unit is a fixed distance from the next scale unit on the Scale Display. Each scaling interval represents the same distance or change in variable value.

Logarithmic – Displays scale units on a logarithmic scale where the distance between each scaling unit on the Scale Display is an automatically determined fixed percentage. When the percentage is automatically determined (more information to follow), this percentage value will vary depending on the volatility of the data displayed on the Chart.

Fixed % Log – Displays scale units on a logarithmic scale where the distance between each scaling unit on the Scale Display is a manually selected fixed percentage.

Exponential – Displays scale units on an exponential scale where the distance between each scaling unit on the Scale Display is a fixed percentage that can be either automatically determined or manually set.   When the percentage is automatically determined (more information to follow), this percentage value will vary depending on the volatility of the data displayed on the Chart.

Bounds

You may choose to add extra vertical chart space using the Bounds option within the Scale Display properties.   Vertical space can be added on a percentage or point basis. This extra space is referred to as padding. The default top padding is 2%; the default bottom padding is also 2%. Change the Top and/or Bottom drop-down from Max/Min Value to Manual and the padding can then be adjusted on a point basis, where extra vertical space will be provided on the basis of dollar value (in the example of a Price Scale).

Items to Include in Scale

When there are multiple plots present within a given pane, you have the opportunity to choose which of those plots will contribute to the Scale Display. By default, all plots visible within the pane contribute to scaling; however, un-checking the box next to any of the plots listed will effectively exclude the plots values from consideration for scaling purposes.

Inverse Scale

It is possible to invert a scale so that lower values are displayed at the top of the scale relative to higher values which are then plotted along the bottom of the vertical scale. To Inverse the scale, select the check the Inverse Scale box pictured.

Line Spacing

Another characteristic of a scale that can be altered is the Scale Line Spacing. There are six types of Scale Line Spacing available:

Auto – When the Arithmetic Scale Method is in use, Auto Scale Line Spacing displays a number of horizontal scale lines that is automatically calculated based on the minimum and maximum values visible within the Scale Display.

Auto Percent – When the Logarithmic or Exponential Scale Methods are in use, Auto Percent Scale Line Spacing displays a number of horizontal scale lines that is automatically calculated based on the minimum and maximum values visible within the Scale Display. The distance between the grid lines is a fixed percent value that is determined by the range of values for the plot over the historical period shown.

Max # of Lines – Fits the maximum number of Scale Display lines possible onto the Scale Display.

Manual – When the Arithmetic Scale Method is in use, Manual Scale Line Spacing displays horizontal scale lines at an interval determined by the Value between Grid Lines setting of the general Scale Properties (more information to follow).

Manual Percent – When the Logarithmic or Exponential Scale Methods are in use, Manual Percent Scale Line Spacing displays horizontal scale lines at an interval determined by the Percent between Grid Lines setting of the general Scale Properties (more information to follow).

Fixed # of Lines – Without regard for Scaling Method used, Fixed # of Lines Scale Line Spacing displays a number of horizontal scale lines determined by the Number of Grid Lines setting of the general Scale Properties (more information to follow).   Use the Font properties section to assign font type and size, as well as value display color and number format.   Defaults for these properties are Arial 10, white, and 0.00 respectively.

Font

Use the Grid Lines properties section to enable/disable grid line plotting and to assign color, opacity, and line-styles for grid lines. Default settings for these properties are enabled grid lines that are light gray with 30% opacity and a solid line style.

Background Properties

Use the Background properties section to enable/disable a Scale Display background color, select the color for background display, enable/disable Scale Display border, and select border color. Default settings for these properties are enable fill background with the color maroon and disabled border drawing.

Scale Position

Use the Scale Position properties section to assign scale location and text alignment within the Scale Display.   Default settings for these properties are Right of Chart and left-aligned text.

Show Status on Chart

Check the Show Status on Chart box to ensure that percentages between gridlines will be displayed at the bottom of the Scale Display when plotting in Exponential or Logarithmic mode.

Chart Properties

Chart Aesthetics

A chart's aesthetics are determined by settings within the *Chart Properties* dialog. There are several properties that may be assigned within this dialog. Each is addressed below. Right-click the background area within a chart; select *Chart Properties* from the menu displayed.
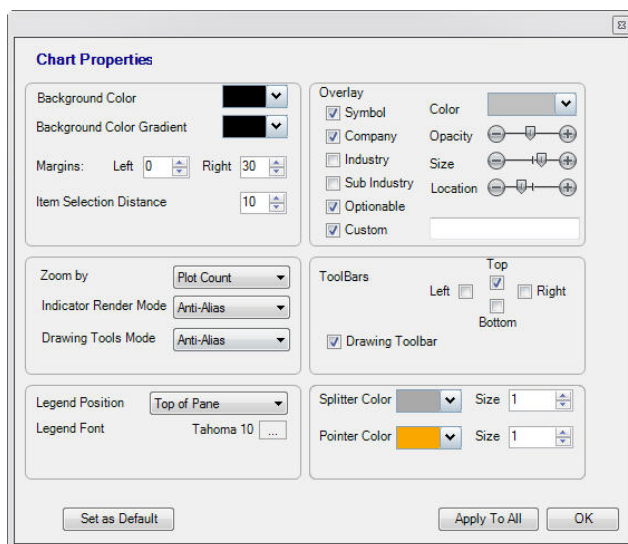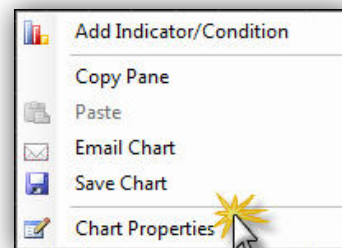
Background Color - The *Background Color* picker changes the background color of the entire chart.

Background Color Gradient - The Background Color Gradient Picker assigns a gradient (fade) color to the associated chart.

Margins - The *Margins* settings increase or decrease the left and right margins of the chart. The larger the numbers set here the more black unused space appears between the left or right of the plot chart and the chart edges.

Item Selection Distance - The *Item Selection Distance* determines how close the mouse needs to be to a plot before it becomes "selected" (it has the highlight boxes appear and is available for clicking). The larger the number the farther away from the plot the mouse pointer can be before it becomes highlighted by the boxes.

Zoom by - If *Zoom By* is set to the default *Plot Count*, as the Bar Interval of the chart changes, the chart will always show the same number of bars. For example, if looking at a daily chart with 40 bars visible (40 days), change to a weekly chart still shows 40 bars (this time, 40 weeks).

If set to *Date Span*, as the Bar Interval of the chart changes it always strive to show the same span in time. For example, if looking at a daily chart spanning from the beginning of November to the end of November (roughly 20 or so bars), changing to a weekly chart shows just the three to five weekly bars in November.

Overlay Symbol, Name and Industry - If the first option is checked the overlay on the chart of the symbol, company name and industry will be visible. If unchecked, it hides this overlay. Below that option the color, opacity and size of the overlay can be changed.

Legend Position - The *Legend Position* setting determines where the legend for each pane appears. By default all of the legends appear at the top of each pane. Legends appear on the chart (no space between the legend and the chart), to the right or left of the chart. If set to *None* there are no legends visible in any panes.

Legend Font - The *Legend Font* sets the font and size of the legends in all of the panes of the chart.

Overlay - Overlay check-boxes allow inclusion of various labels to be overlaid on each applicable chart. Overlay options include Symbol, Company, Industry, Sub Industry, Optionable, and Custom. Display properties of included overlay items can also be assigned here, including overlay Color, Opacity, Size, and Location.

Tool Bars - The four check boxes make the four Tool Bars visible or hidden. By default only the top bar is visible.

Splitter Color - The *Splitter Color* sets the color of the pane splitters for the chart. The pane splitters are the horizontal lines that separate the panes from each other.

Splitter Size - The *Splitter Size* sets the size (thickness) of the pane splitters for the chart. The pane splitters are the horizontal lines that separate the panes from each other.

CROSSHAIRS, DATE POINTERS, AND VALUE POINTERS

Activating Crosshairs

To activate a temporary crosshair on the chart and view values for all indicators showing on the chart for the bar specified using the crosshair, hold the left mouse button down and drag the cursor to the desired location on the chart. The crosshair pointer shows the date and scale values on horizontal and vertical scales, respectively. The values for each indicator displayed on the chart for the bar defined by the cursor is shown in the data box at the top left of the chart. Release the mouse button to disable the temporary crosshair pointers and data box.

To keep the crosshair pointer and the data box on the screen (without the mouse) press the period key once for just the crosshairs and twice for both the crosshairs and the data box. Press the period key again to disable both.

Date/Value Pointers

Adding a Date or Value Pointer to a Chart

Adding a Date Pointer
To add a date pointer, left click within the **Date Scale** and choose *Add Date Pointer*. Left click and drag the date pointer box to the desired chart position. There is no limit to the number of date pointers you can add to a pane.
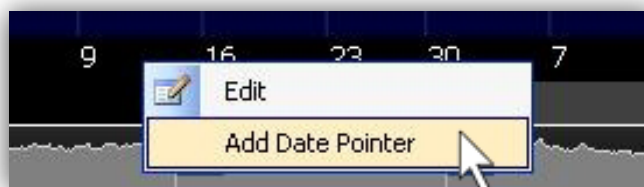
Adding a Value (Horizontal) Pointer
To add a value (horizontal) pointer, left click within the **Value Scale** and choose *Add Horizontal Pointer*. Left click and drag the horizontal pointer box to the desired scale position. There is no limit to the number of horizontal pointers you can add to a pane.
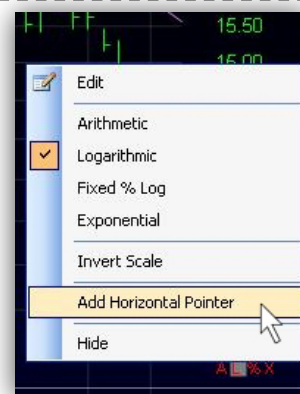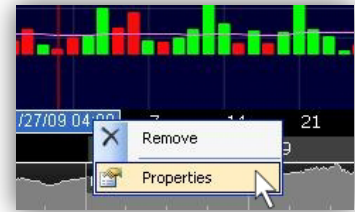
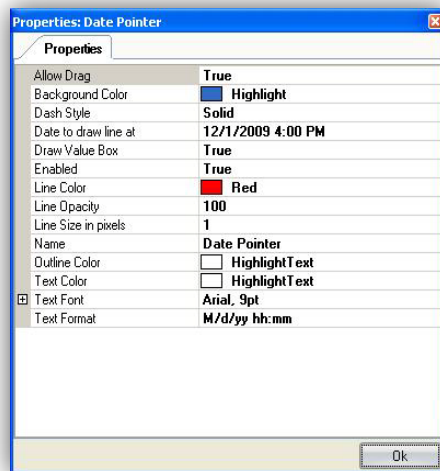Value pointers may be added to any indicator pane.

Editing the Properties of a Date or Value Pointer

Editing Date Pointer Properties

To edit the properties of a date pointer, right click the date pointer box (in the Date Scale) and choose *Properties* from the menu displayed. Use the *Edit dialog* to create the desired properties. Select *OK* to save property changes.

Properties that can be edited follow:

Allow Drag--Allows the line to be dragged on the scale

Back Color--Defines the background color of the date box (in the scale)

Dash Style--Defines the style of the date line

Draw Value Box-- Enables visibility of the date box visible in the Date Scale

Line Color--Defines the color of the date line

Line Opacity--Defines the brightness of the date line

Line Size in Pixels--Defines the size of the date line

Name--Names the date pointer

Outline Color--Defines the color of the outline of the date box

**Text Color--**Defines the color of the text in the date box

Text Font--Defines the font used for the text in the date box
(Click the plus sign to set font properties such as size, bold, etc.)

Text Format--Defines the date/time format of the date pointer

Editing Value Pointer Properties

To edit the properties of a value pointer, right click the value pointer box (in the value scale) and choose *Properties*. Use the *Edit dialog* to create the desired properties. Click *OK* to save property changes. Properties that can be edited follow:
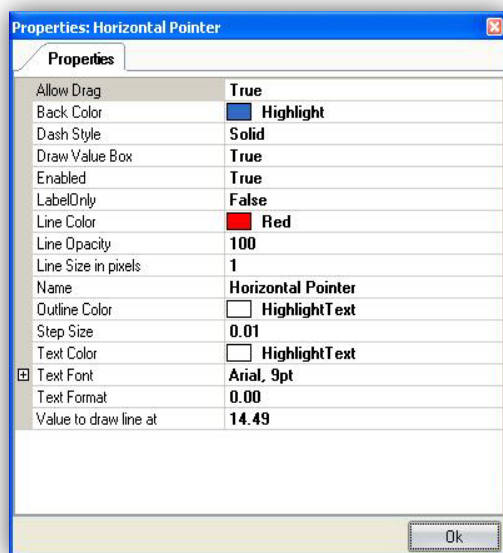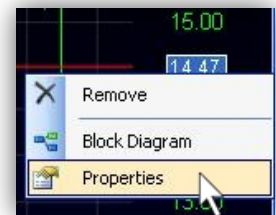
Allow Drag--Allows the line to be dragged on the scale

Back Color--Defines the background color of the value box (in the scale)

Dash Style--Defines the style of the horizontal line

Draw Value Box--Makes the horizontal pointer box visible in the value scale

Label Only--Displays only the value box with no line

Line Color--Defines the color of the horizontal line

Line Opacity--Defines the brightness of the horizontal line

Line Size in Pixels--Defines the size of the horizontal line

Name--Names the horizontal line

Outline Color--Defines the color of the outline of the horizontal box

Step Size--Defines the size of the incremental movement as the horizontal line slides

Text Color--Defines the color of the text in the horizontal pointer box

Text Font--Defines the font used for the text in the horizontal pointer box
(Click on the plus sign to set font properties such as size, bold, etc.)

Text Format--Defines the decimal format of the value displayed in the horizontal pointer box

Value to Draw Line at--defines the exact numerical value on the chart at which the horizontal line is displayed
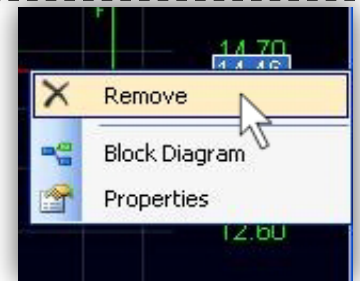
Deleting a Date or Value Pointer from a Chart

Deleting a Date Pointer

To delete a date pointer, right click the *date pointer box* (in the Date Scale) and choose *Remove* from the menu displayed.
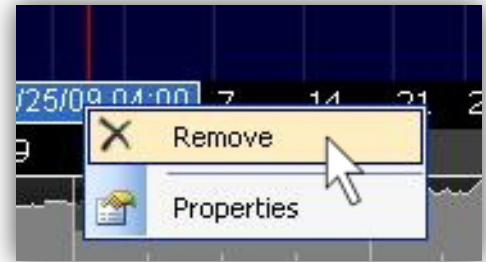
Deleting a Value (Horizontal) Pointer

To delete a value (horizontal) pointer, right-click the *horizontal pointer box* (in the value scale) and choose *Remove* from the menu provided.

MARKET REPLAY

Market Replay is a feature designed to provide you with the ability to replay previous Market action in a simulated real-time environment.

Select *Market Replay* from the *File* menu in order to initiate the *Market Replay* dialog. Within the dialog, select a *Playback Interval, Playback Speed, and Start* date (and/or time). Once playback characteristics have been assigned, select *Play*. The visible chart will be clipped back, such that the last data displayed on the chart corresponds to the specified Data/Time. New Price and indicator information will be made visible on the chart only as frequently as specified by the Playback Speed assigned.


Playback Interval - Select whether you would prefer to play the Market back at 1 Minute intervals *(Intraday)* or at Daily intervals *(Daily)*.

Playback Speed - Determine how frequently each interval of new data should be displayed on the chart. Playback Speeds range from **x 1/2** to **x 960.** At a Playback Speed of x 1/2 and an Intraday Playback Interval, a new minute of Market information is displayed on the chart every 2 minutes. Slide the Playback Speed slider to the right to increase the frequency with which each interval of new Market information is displayed on the chart.

Start Date/Time - Assign the date and time for which replay should begin. You are limited to five days of intraday history for replay.

Controls - Options include *Play, Stop, Pause, Step Back, and Step Forward*. Once Playback characteristics are assigned, select *Play* to begin Market Replay. Select *Stop* or *Pause* at any point to discontinue replay. Use *Step Back* in order to undo one Market update at a time; use *Step Forward* to progress the chart one Market update at a time.
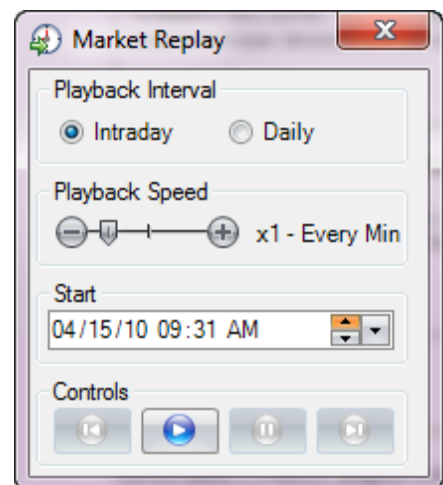
Note: Any conditions that are active within a Layout will be applied using historical data as it is charted when in Market Replay mode.

CHART TOOLBAR

Add Indicator/Condition to Chart

Select the *Add Indicator/Condition* button to initiate a menu of all library indicators and conditions - as well as any indicators or conditions you have created and saved.   You may type within the *Search* field at any time to limit the list based on keyword.   To make a selection from the menu of available items, select the desired item from the list to add it to the active chart.
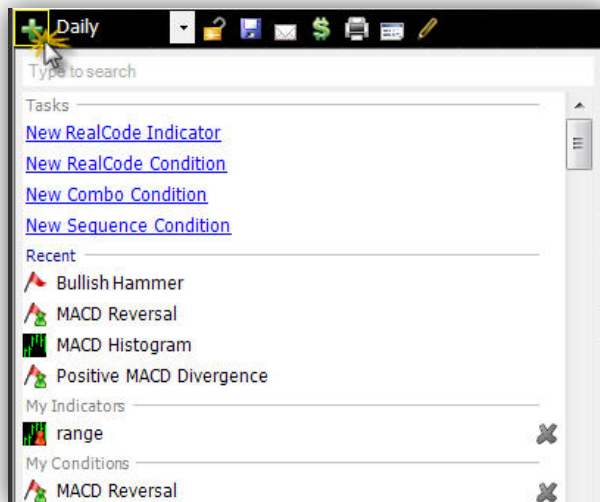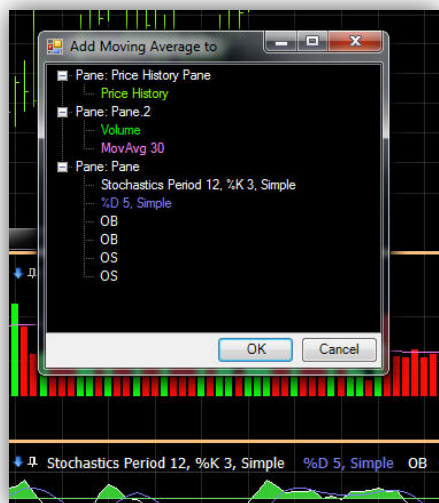
Note:
If the selection made is a child plot - meaning its calculation is based on the value of some other plot that needs to be assigned - you will be prompted to assign the parent plot from a list of all other indicators currently included on the active chart.

Bar Interval Selector

The *Bar Interval Selector* menu sets the amount of time associated with each bar. If set to *1 Day* the chart will plot a daily chart with one trading day assigned to each bar. All of the Bar Intervals in StockFinder are calendar based. As a result, a weekly chart assigns one trading week to each bar (some bars may not contain five days of trading if there was a market holiday).

To the right of every Bar Interval on the list is the hotkey associated with that Bar Interval. Pressing the hotkey on the keyboard changes the Bar Interval of the chart. For example, press the 1 key on the keyboard to change to a daily chart. Press the 5 key to change to a weekly chart. Platinum users will see intraday timeframes in the picker.
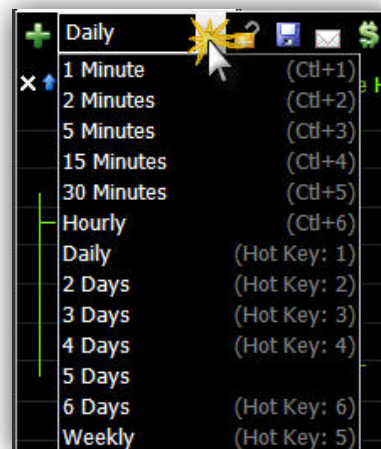
These have two-key combinations for their hotkeys. Hold the *CTRL* key and press 1 to make a 1-minute chart.   At the bottom of the picker is the *Edit* option. Clicking it brings up the *Bar Interval Properties* window.   At the top is the option of displaying Bar Intervals as either a pull-down list (the default) or as a series of tabs along the top of the chart.   Select any Bar Interval on the list and click *Remove* to eliminate that Bar Interval from the list.

Click *Add* to create a new Bar Interval. Clicking *Add* brings up the *Add Bar Interval* window. Choose the time denomination (day, week, month, etc) and the number (1,2, etc).   For a 5-day chart set this to 5 and *Day*.   Platinum users have the option of making the Bar Interval streaming or not. Click *OK* to add the new Bar Interval to the list.

Lock Symbol

By default, all charts display information for the current active symbol - whether that symbol was selected from a WatchList or was 'jumped' to.   The Lock Symbol button forces its chart to permanently display the symbol that was active when the lock was initiated.

For example, if the active symbol were changed to SP-500, and the *Lock Symbol* button were selected, the chart would always display Price and other indicator information for the S&P 500 without regard for other symbol selections made via the WatchList or 'jump'.

This function may come in particularly useful if you choose to view more than one chart simultaneously.   The *Lock Symbol* function will allow you to force one or more charts to display information for specific symbols, while unlocked charts will display information for any symbol you choose from a WatchList or 'jump'.

Save Chart

The *Save Chart* button saves the current chart to the *My Charts* section of the Add Chart library.   If the chart being saved has never been saved before, the Save Chart button initiates a prompt to Save As....   If the chart has been saved before, the Save Chart button creates a prompt to choose one of two actions: Save, which saves any changes made since the last Save action - or Save As..., which creates a separate chart file under a new name.

A Details button appears within the Save and Save As... dialogs.   Within this area, the path for the saved chart and a link to an outside URL can be assigned.

Email or Share Chart

The *Email or Share a Chart* button provides the ability to email a chart to a friend or to store personal charts on Worden server space.

E-mailing a Chart

Select the *Email Chart to a Friend* sub-menu option to initiate the *Email a Friend* dialog. Enter the recipient's email address in the *Email To* field. The account login name is automatically populated adjacent to *Your Name* but can be changed. The email's subject can be entered in the *Subject* field. The large text box below *Subject* is for entering a message for the body of the email.

Select *Send* once ready to send the email to the recipient including the subject, body text, and a screenshot of the current chart. The current chart is attached (as a file) to the email. The recipient may save the attachment on their computer and open the chart in their StockFinder software. Note that the recipient does NOT need StockFinder to view the screenshot of the chart.

Sharing a Chart

When sharing a chart, you are choosing to store a personally customized chart on Worden server space. The shared chart can then be made available for viewing by the entire StockFinder community or can be password protected and therefore inaccessible to anyone without the password.

Select the *Share To All Users* sub-menu option to initiate the *Share My Item* dialog. Provide a name, description, a password if desired, and a reference web address if applicable. Select *Share* when all fields are complete. The chart will be stored within the *Shared Items* library for later retrieval.

> **Note:**
> Navigate to the Browse Other Users Shared Items sub-menu of the Shared Items button on the Main Menu in order to retrieve a shared chart. Select the Charts tab within the Shared Items dialog in order to locate the desired chart; either double-click the desired chart within the list or highlight the desired chart and select Open in order to open the selected chart in StockFinder. You will need the assigned password to access any chart marked with a lock image.

Show Broker Trading

The *Show Broker Trading* button provides the ability to visually review open trades and execute trades on the chart using a TDAmeritrade, Interactive Brokers, or OptionsXpress brokerage account. Select the *Show Broker Trading* button to toggle the chart-trading area on. A vertical space will open to the right of the price scale. You must be logged in to one of the three brokerage accounts listed above to view.

To login to any of the three brokerage account types, navigate to the *Brokers* menu and select the login option from the appropriate broker sub-menu.

Print Chart

The *Print Chart* button initiates the *Print Chart* dialog.   This dialog provides a preview of the chart being printed and includes several controls you may choose to adjust.   Controls include the following:
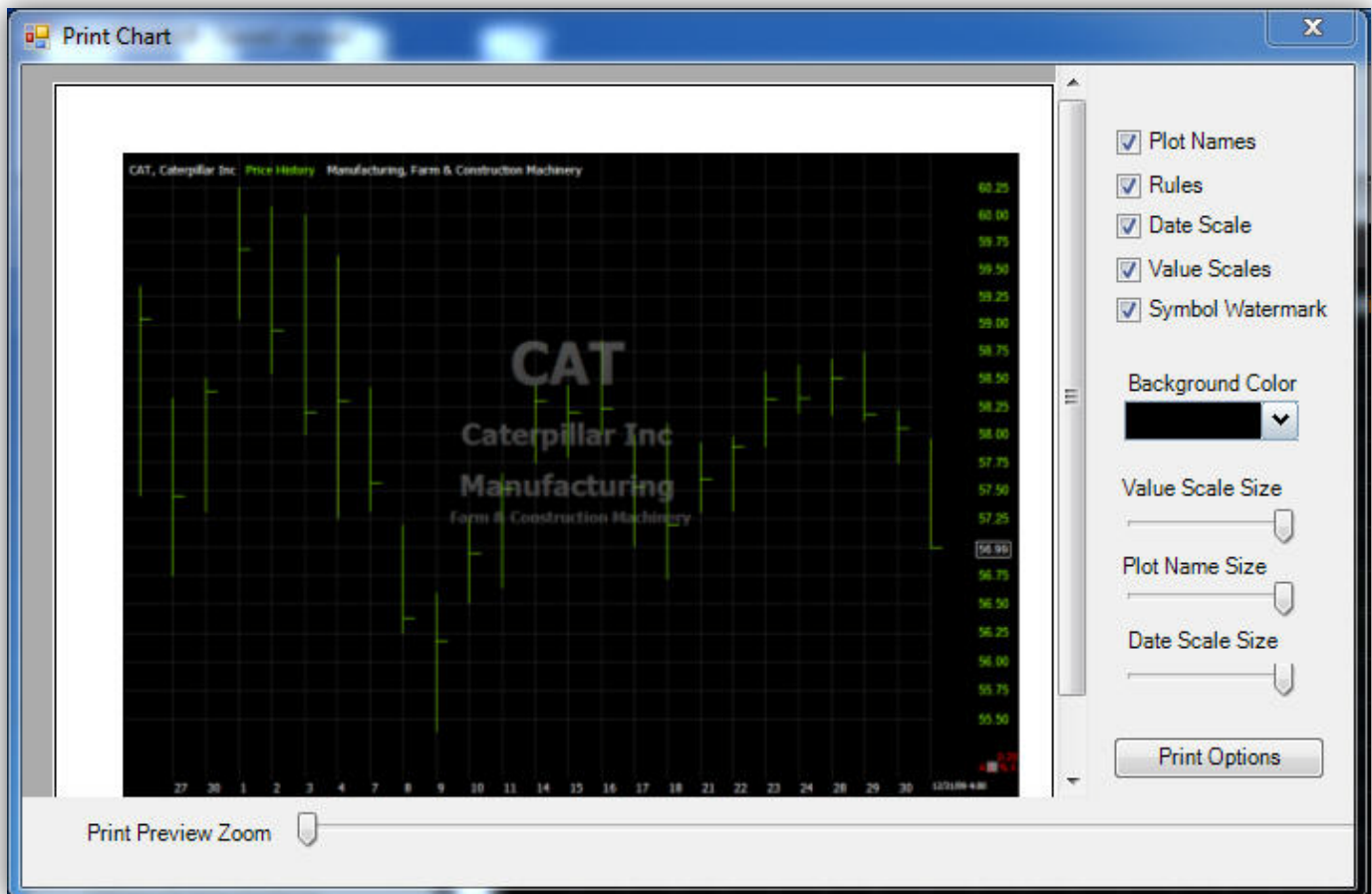
Print Preview Zoom - controls the display size of the chart preview.

Items to Include when Printing - options include Plot Names, Conditions, Date Scale, Value Scales, and Symbol Watermark.   Any of these items may or may not be included in the printed chart.

Background Color - controls the print color for the background of the chart being printed.

Chart Component Sizes - sliders control the relative size of various chart components when printed.   These components include Value Scale Size, Plot Name Size, and Date Scale Size.

Select *OK* to finalize selections and print the chart; select *Cancel* to exit the chart printing process.
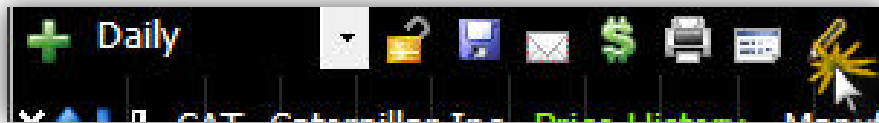
Equalize Panes

The *Equalize Pane* button automatically evenly resizes the vertical span of every pane on the chart.
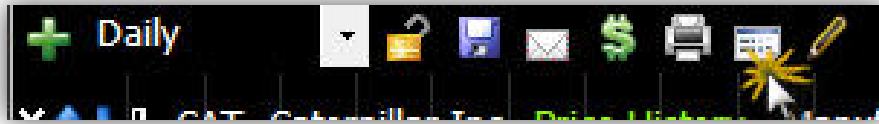
Drawing Tools

The *Drawing Tools* button provides five options:

1. **Show from All Charts (Ctrl+T) -** Select to display drawings that were created on any chart
2. **Show from This Chart (Ctrl+T) -** Select to display only drawings that were created on the current chart
3. **Hide Drawings (Ctrl+T) -** Select to toggle all drawing tools ON/OFF for the current chart
4. **Drawing Toolbar -** Select to toggle the drawing toolbar ON/OFF
5. **Display Options -** Select to adjust chart Bar Intervals in which drawings get displayed

The *Ctr+T* command toggles between options 1, 2, and 3.   If there are no drawings applicable for the selected chart, option 2 above is skipped.

Available drawing tools include the following:

Lines - Trend Line, Horizontal Line, Vertical Line
Andrew's Pitchfork
Tirone Levels
Quadrant Lines
Fibonacci Tools - Arc, Retracement, Fan, and Time Zone
Regression Tools - Regression Line, Regression Channel, Raff Regression Channel, and Error Channel
Gann Fans
Speed Lines
Chart Text
Shapes - Rectangle, Ellipse, Value Label, Up Arrow, Down Arrow, Right Arrow, and Left Arrow

To activate any of these tools, select the desired tool from the *Drawing Tool* menu, then click within the charting area to initiate the chart drawing.

The *Ctrl+Click* command initiates the last drawing tool used.

PAINT SCHEMES

Paint Schemes allow you to apply conditional color schemes to an indicator. The *Paint Scheme* menu provides a few pre-configured schemes, which are listed under the *Library* section of the menu. The *Tasks* section of the *Paint Scheme* menu provides the opportunity to create a new scheme, edit the current scheme, clear the current scheme, or save the current scheme so that it becomes a permanent member of the *My Paint Schemes* section of the menu. You may type a keyword into the *Search* field at any time to limit the list of schemes to only those that contain the keyword typed.

Applying a Library Paint Scheme to Price

Select *the Paint Scheme Drop-Down* located in the bottom left-hand corner of the Price pane. From the *Library* section of the menu displayed, make a scheme selection. The pre-configured Paint Scheme will be assigned to the Price plot. Price bars that meet a conditional criteria of the Paint Scheme will be painted the corresponding assigned color. To toggle the Paint Scheme off once it's selected, click the body of the Paint Scheme button. The Price plot color should return to its default settings.
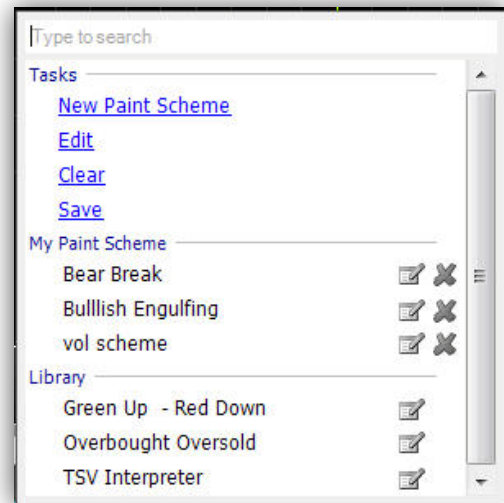

Creating a New Paint Scheme

Select the *Paint Scheme Drop-Down* located in the bottom left-hand corner of the Price pane. From the *Tasks* section of the menu displayed, select *New Paint Scheme*. Provide a name for the scheme within the *Name* field; if you would like to change the base color of the plot, you may do so using the *Base Color* option. Use the *Base Color Drop-Down* to assign the base color for the plot. Then add as many behavioral conditions as you would like using the *Add Condition* button. Conditions available for use in a Paint Scheme are those that belong to the *Condition Library* or that have been created and saved by you previously. Select *Save Paint Scheme As...* if you would like to save the scheme at this stage. Otherwise, select *OK* to close the dialog and apply the Paint Scheme to the Price plot. To toggle the Paint Scheme off once it's selected, click the body of the *Paint Scheme* button. The Price plot color should return to its default settings.
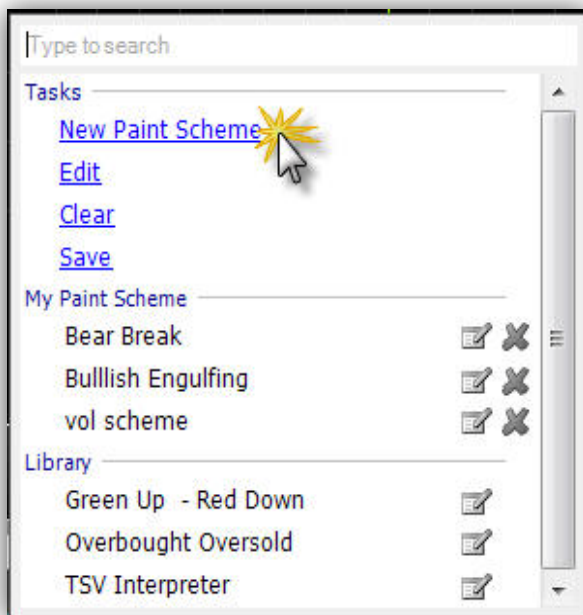
Editing, Clearing, or Saving the Current Paint Scheme

An applied Paint Scheme can be edited while in use via the *Tasks* section of the *Paint Scheme Drop-Down*.   Select the *Edit* option from the menu displayed to make any desired changes within the *Edit Paint Scheme* dialog.   To save the adjusted scheme under a new name, select *Save Paint Scheme As...*   Select *OK* to close the dialog and apply the Paint Scheme edits.   To save changes to the current scheme, select the *Save* option listed under the *Tasks* section of the *Paint Scheme Drop-Down*.
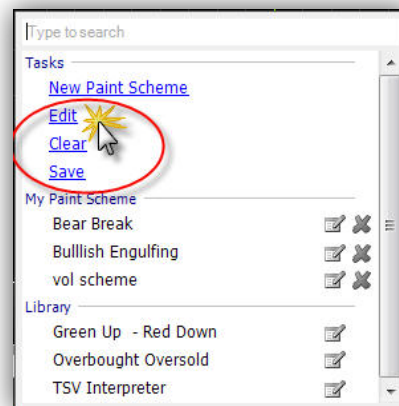

## Applying a Paint Scheme to an Indicator Other than Price
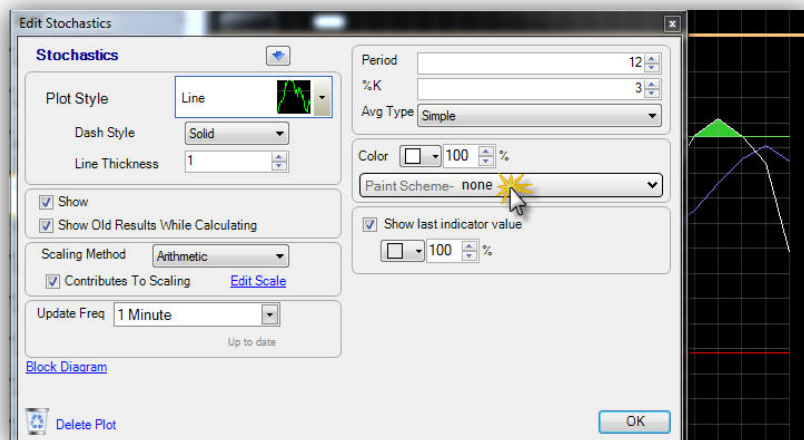
Paint Schemes can be applied to any indicator; they are not Price-specific.   Left-click any plot on a chart, and use the *Paint Scheme Drop-Down* within the indicator's *Edit* dialog to create and apply a new scheme or to apply a *Library* or *My Paintbrushes* scheme.   The indicator's Paint Scheme may be cleared using the same Paint Scheme Drop-Down.

Adding a Condition to a Paint Scheme

Any condition can be used to temporarily replace a Paint Scheme - or can be added to an active Paint Scheme.   To accomplish either of these tasks, drag a condition from a chart onto a plot you'd like to paint using the condition.   You will be presented with two choices via a menu: *Paint* or *Add to Paint Scheme*.
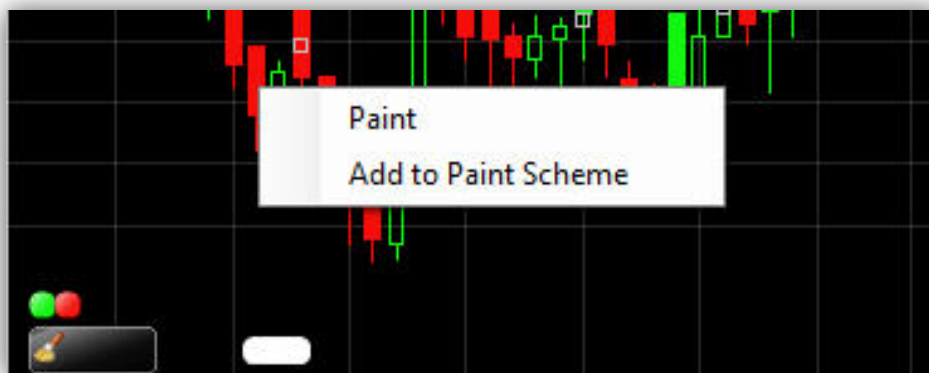
Paint - temporarily overrides the active Paint Scheme, such that the painted plot returns to its default base color, and each bar of the plot that corresponds to the defined conditional behavior is painted the color of the condition applied. You may also Shift + Click a condition on a chart to affect the same change. The original Paint Scheme may be restored by clicking the body of the *Paint Scheme* button.
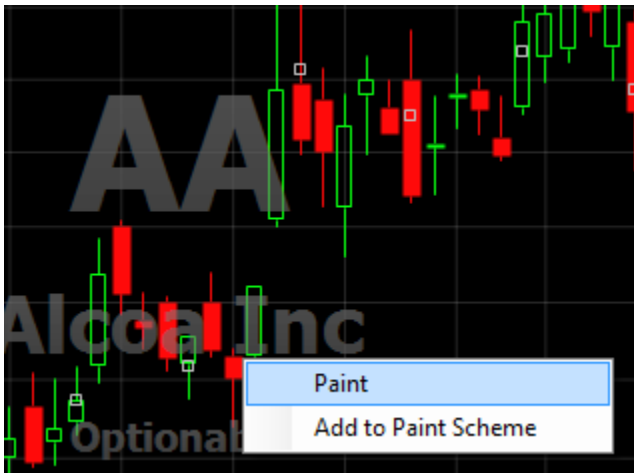
Add to Paint Scheme - maintains the current Paint Scheme and adds the conditional behavior of the activated condition to the scheme. Each bar of the plot that corresponds to the defined condition behavior is painted the color of the condition applied - on top of the original Paint Scheme in place. Note that should you choose the *Add to Paint Scheme* option, the added conditional behavior will not be made a permanent part of the Paint Scheme unless you save the changes to the Paint Scheme while the added conditional behavior is in place as part of the Paint Scheme. If you choose to save changes to the new scheme, select the body of the Paint Scheme button, and select *Save*.
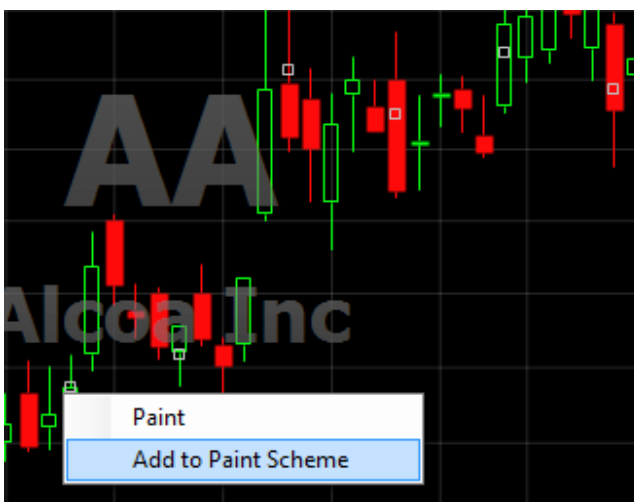

Note:
Paint Schemes are global. That is, if you make changes to a Paint Scheme as it applies to one indicator, any other currently active or previously saved indicator that uses that Paint Scheme will be affected as well.

INDICATORS IN STOCKFINDER

Adding Indicators to a Chart

There are two basic methods you might use to add an indicator to a chart.

Select the *Add Indicator/Condition to Chart button* and from the menu of indicators and conditions presented, select the desired indicator.   Note that you may choose indicators from any of these categories: Recent, My Indicators, or Library Indicators.   You may enter a term into the Search field to limit the list of available menu items by keyword.   Select the desired item once located, and the indicator will be added to the chart.
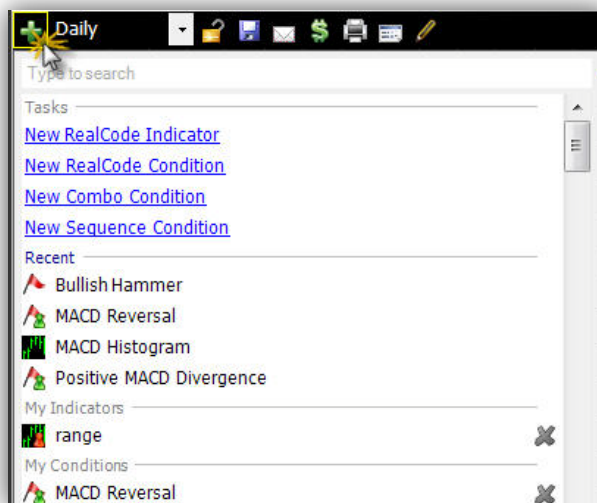
Use the (/) command to initiate the Shortcut dialog.   This dialog allows you to search for any library or saved item by keyword.   Enter a term into the Shortcut field to limit the list of available menu items by keyword.   Select the desired item once located, and the indicator will be added to the chart.
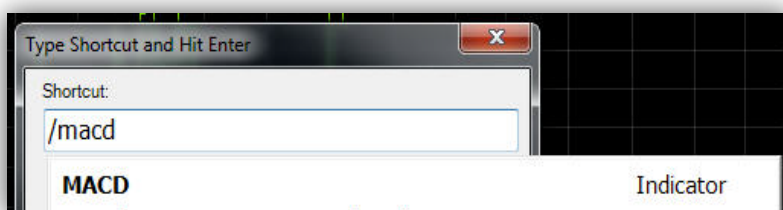
Note:
 Some indicators known as child indicators create calculations based on an assigned parent indicator.   For example, a Moving Average indicator creates a calculation that studies the behavior of a selected parent indicator - sometimes Price, sometimes another technical indicator.   If you select a child indicator from the list of available indicators using either of the two methods described above, you will be prompted to assign a parent indicator to the selected child indicator via a dialog that lists all indicators available for use.
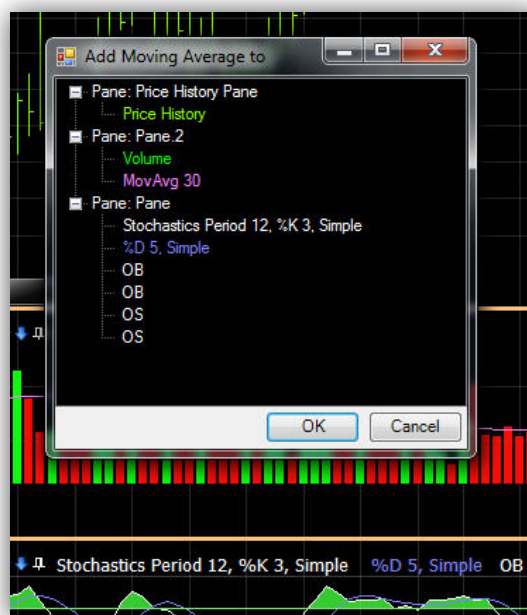
Managing Indicators on a Chart

Editing an Indicator

Each indicator can be edited.   Click any indicator or its name in the legend to access its *Edit* dialog. Within the Edit dialog, there are several indicator characteristics that can be controlled.   These include the following:
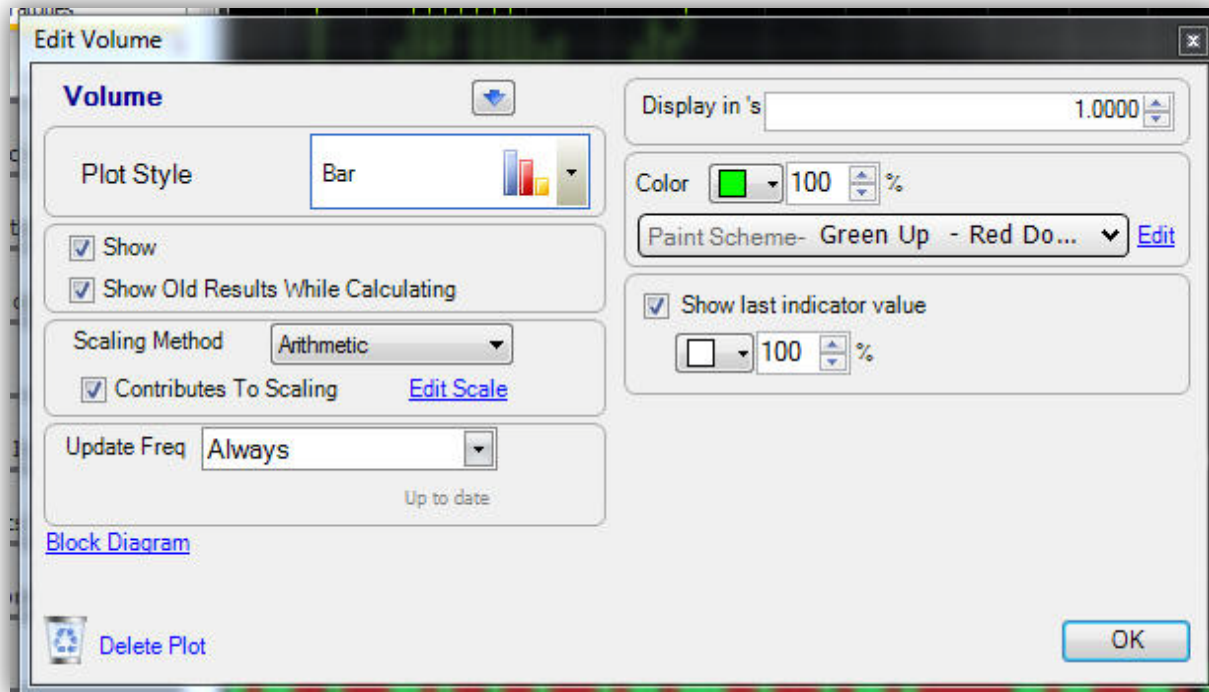
Plot Style - Assign the type of marker that should be used for a plot on a chart

Dash Style - Assign the pattern that should be used for a plot on a chart

Line Thickness - Assign line thickness for a plot on a chart

Show - Display the indicator of interest on the chart

Show Old Results While Calculating - Display previously calculated indicator data while new calculations are taking place

Scaling Method - Assign scaling method for an indicator or set of indicators

Contributes to Scaling - Include or exclude selected indicator from inclusion in scaling calculations

Update Frequency - Assign how frequently the selected indicator's value should be calculated

Plot Parameters - Assign periods and any other necessary parameters for selected indicator

Color and Opacity - Assign color and opacity (transparency level) for selected indicator

Paint Scheme - Apply a saved or create a new paint scheme for the selected indicator

Show Last Indicator Value - Enable or disable a scale display box containing the most recently available value for the selected indicator

Managing Indicator Panes

There are four controls in the top-left corner of every pane, which are intended to provide you with the ability to change the characteristics of the way a pane is displayed.   From left to right, these controls include: Close, Move Up, Move Down, and Pin.

Close - Deletes the pane and all of the indicators it contains

Move Up - Changes the relative location of the pane.   Shifts the pane above the pane that is directly above it.

Move Down - Changes the relative location of the pane.   Shifts the pane below the pane that is directly below it.

Pin - Creates a tabbed version of the pane, which resides to the left of the charting area.   This tab may be maximized at any time by selecting the tab name.   The pane is then restored to its original location before pinning.

Creating a Market Indicator

A Market Indicator is an indicator whose job it is to calculate some value across a list of issues (as opposed to a single stock or Exchange Traded Fund). A Market Indicator can be built based on a single indicator from a chart - or - can be based on a condition.

A Market Indicator built using an indicator from a chart aggregates a specified indicator - whether that be Price or some technical indicator - across all of the issues in a chosen WatchList. An example would be plotting the average Stochastics of a WatchList of stocks as opposed to simply plotting the Stochastics of an individual equity from the list.

A Market Indicator built using a condition plots information about the participation of WatchList items in a specific behavior. An example would be plotting the number of stocks historically that were above their own Moving Averages on a given day.
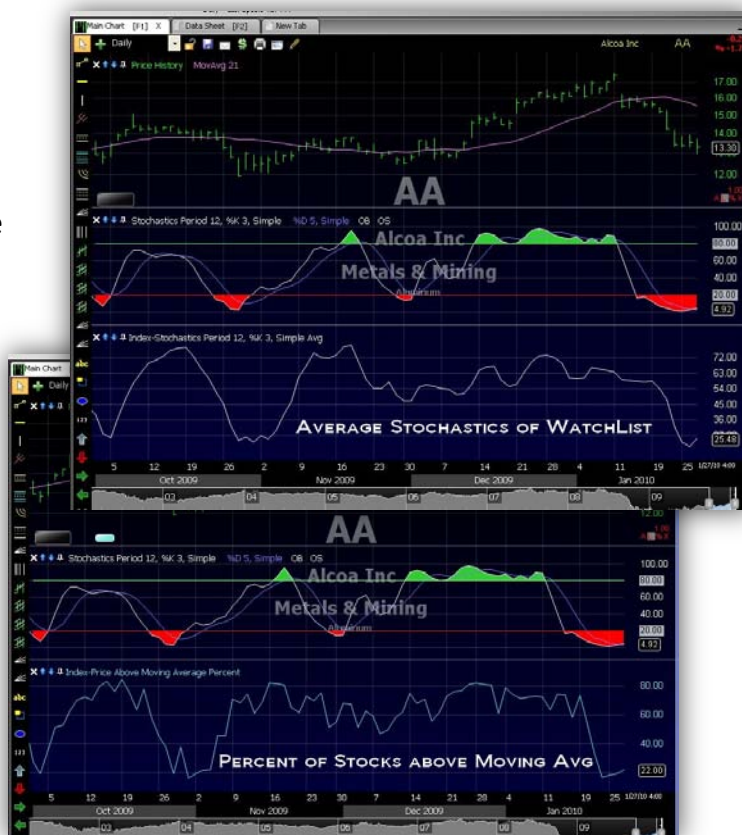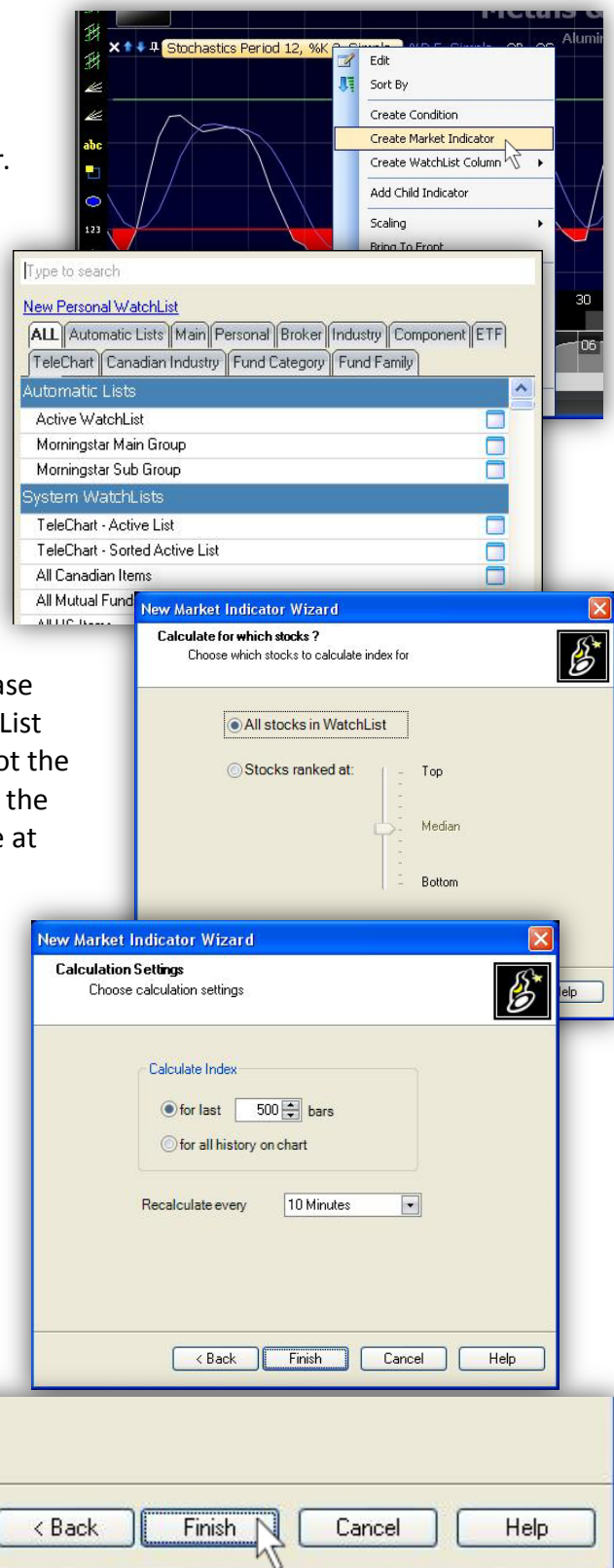
Creating an Indicator-Based Market Indicator

To create a Custom Market Indicator from a plotted indicator in StockFinder, right click the indicator plot and choose *Create Market Indicator*. This opens the *Market Indicator Wizard*.

Now choose the WatchList on which to create the Custom Market Indicator. *Active WatchList* will calculate and plot the Market Indicator on whichever WatchList is selected. Or choose from the library of WatchLists to build the Market Indicator on a specified list.

Choose the stocks in the WatchList on which to base the Custom Market Indicator. All Stocks in WatchList uses all of the stocks in the list to calculate and plot the indicator. Using the *Stocks Ranked At slider* limits the number of stocks used in the calculations to those at and above a set level.

Choose the number of bars on which to base the calculations of the Custom Market Indicator. This determines how many bars (historically) the indicator will plot. Place the exact number in the field available or choose *For All History on Chart* to plot for entire history. Set the frequency at which the indicator will be recalculated (refreshed) with the values next to *'Recalculate every'* field.

Click *Finish* to calculate and plot the Custom Market Indicator.

Creating a Condition-Based Market Indicator

Start by creating a condition on which to base the Custom Market Indicator. (See the Create Condition section for details.)

To create a Custom Market Indicator from a condition in StockFinder, right-click the condition bubble and choose *Create Market Indicator*. This opens the *Market Indicator Wizard*.

Now choose the WatchList on which to create the Custom Market Indicator. *Active WatchList* will calculate and plot the Market Indicator on whichever WatchList is selected. Or choose from the library of WatchLists to build the Market Indicator on a specified list.

Select the type of results the Custom Market Indicator is to return. In this example, choose *Percent Passing* to see the percent of stocks in the WatchList above their moving average; *Count Passing* for the number of stocks in the WatchList above their moving average or *Average Number of Bars Since Passed* to see historically the average number of bars since the condition occurred for the stocks in the WatchList.

Choose the number of bars on which to base the calculations of the Custom Market Indicator. This determines how many bars (historically) the indicator will plot. Place the exact number in the field available or choose *For All History on Chart* to plot for entire history. Set the frequency at which the indicator will be recalculated (refreshed) with the values next to *'Recalculate every'* field.

Click *Finish* to calculate and plot the Custom Market Indicator.
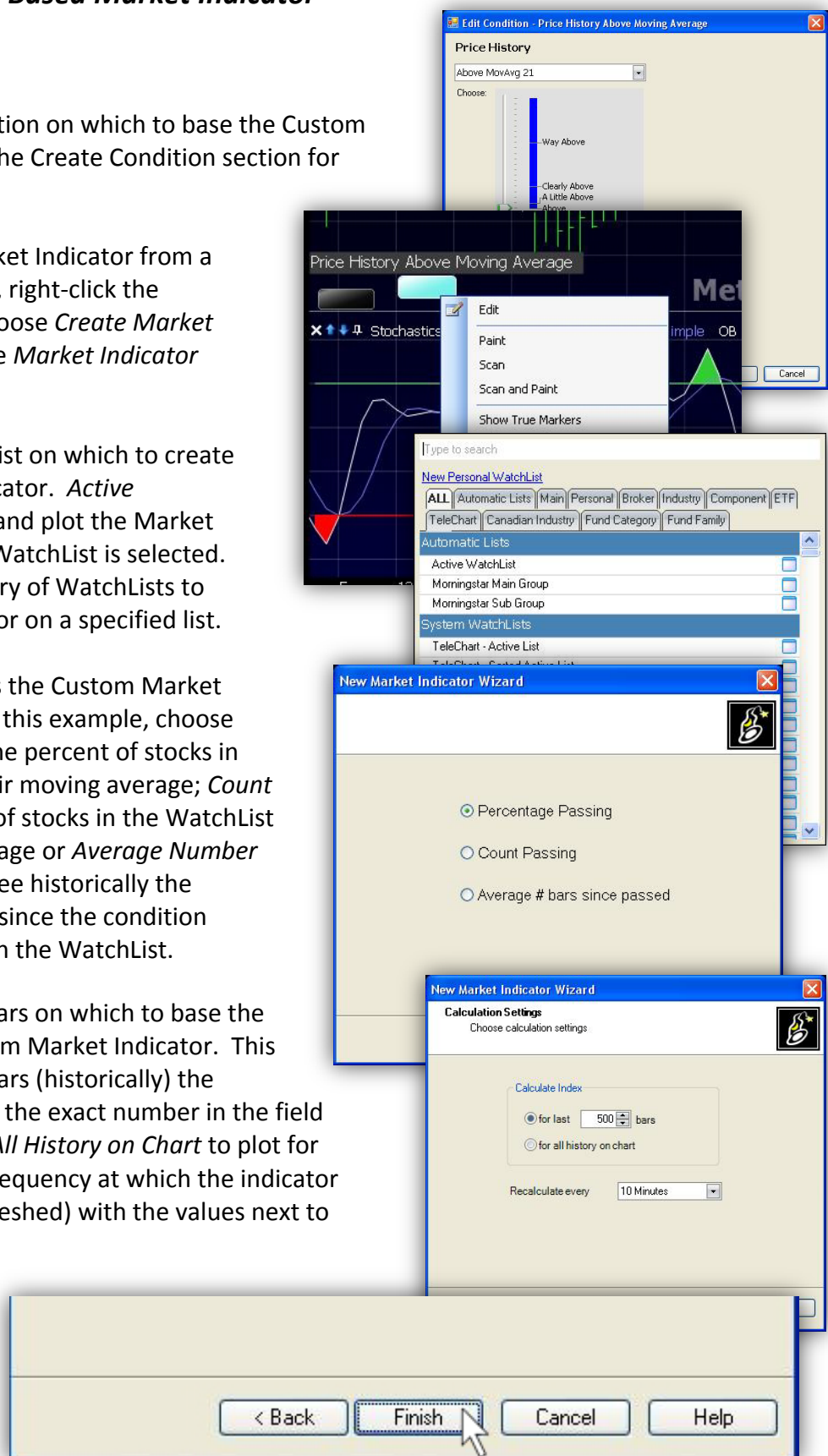
Overlaying Indicators

Any indicator may be forced to share a pane with any other indicator. For an indicator you wish to overlay, drag the desired indicator into its desired destination pane. With your mouse cursor located somewhere within the background area of the destination pane, you should see an *Overlay or Move Pane* tooltip. Release the cursor when you see this message and choose the Overlay option from the menu provided.
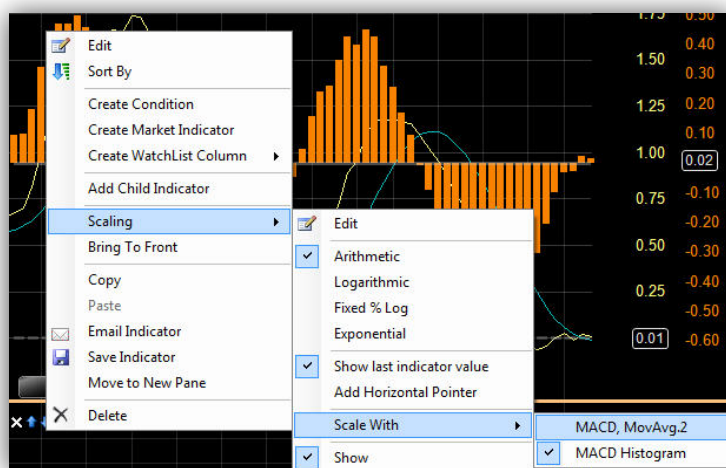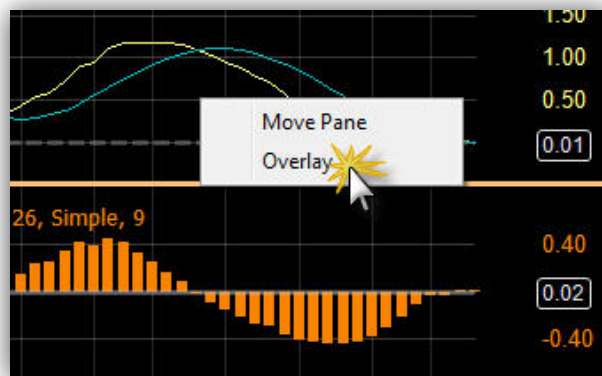
By default, an indicator that is overlaid will be scaled independently. Its scale should appear in addition to the scale of the original resident indicator(s). There may be times when it will be appropriate to force the overlaid indicator and the original resident indicator(s) to share the same scale. If/when that is the case, right-click the overlaid indicator, and from the menu provided follow this path: *Scaling | Scale With | scaling partner of choice.*

Viewing Historical Charts

Use the Zoom and Pan Slider located horizontally along the bottom a Layout in order to zoom (view more historical information). Grab the handle on either side of the Slider to drag and therefore zoom the amount of chart history displayed. To view a chart of a historical period, place your mouse cursor over the blue highlighted area of the Slider and drag to the left or right.

Zoom Controls
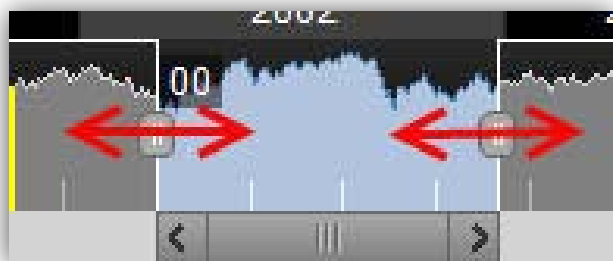
Sorting and Scanning to Find Stocks

USING THE WATCHLIST TO SORT

WatchLists can be used to sort any displayed list of items by symbol, indicator value, or by some condition.   Any of these sorts can be performed in ascending or descending order.   Utilizing a WatchList to organize items will likely become one of the most important functions of StockFinder for you.

SORTING BY AN INDICATOR VALUE

To Sort by Indicator Value -
Any indicator can be used to create a sort column within a WatchList.   A sort column created in this way will order the items in the WatchList by the current value of the indicator used to create the column.

There are two ways to create an indicator column within a WatchList.

1. Right-click any displayed indicator and choose Sort by from the menu provided. This creates a temporary sort column which will be replaced the next time you request a temporary sort column for any reason. The same type of temporary column can be created by dragging any displayed indicator into a WatchList area. Select Sort from the menu provided.
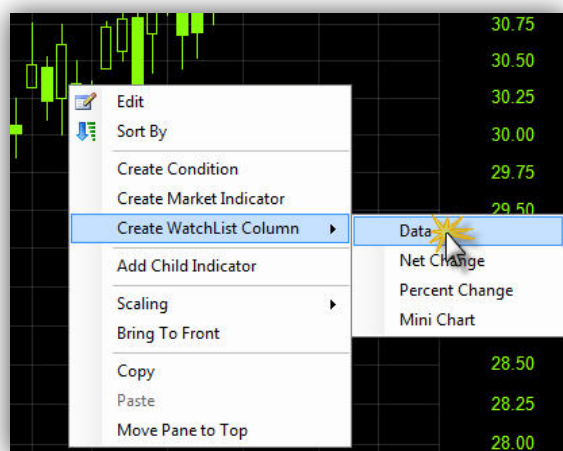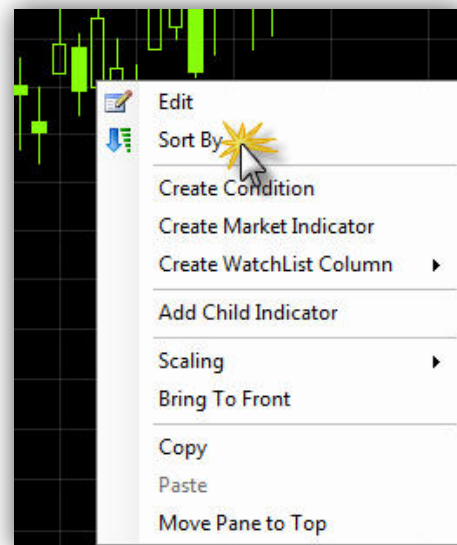
Alternatively, right-click any displayed indicator and choose Create WatchList Column; then choose Data. This method creates a permanent (until you delete it) sort column for the indicator.

2. The second method for creating an indicator column is to select the Add Column button located in the top-right corner of the WatchList header area. Manually locate the desired indicator from the list or type the name of the desired indicator to limit the list of available indicators by keyword. The column created represents the current value of the selected indicator for each item in the list. This column will not be sorted by default. To sort the list, left-click the column's header. To change the sort order, left-click the column's header once more.
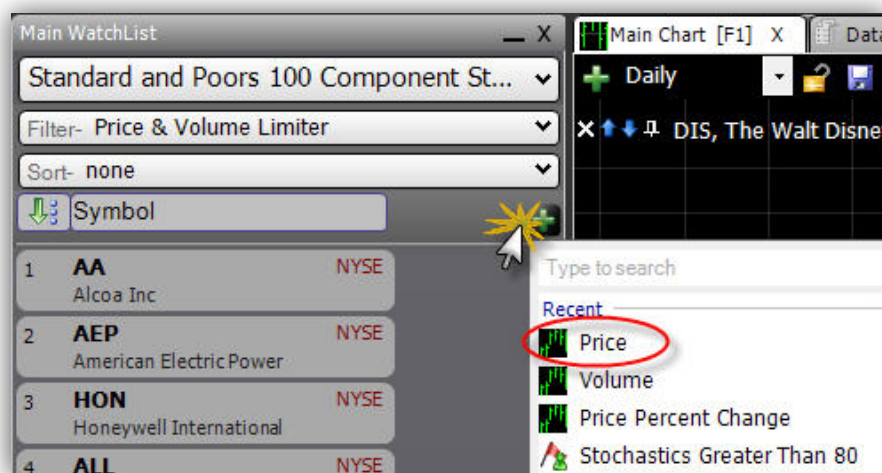
CREATING A CONDITION

A condition can be created to identify items that either currently or have historically displayed a behavior that you define.
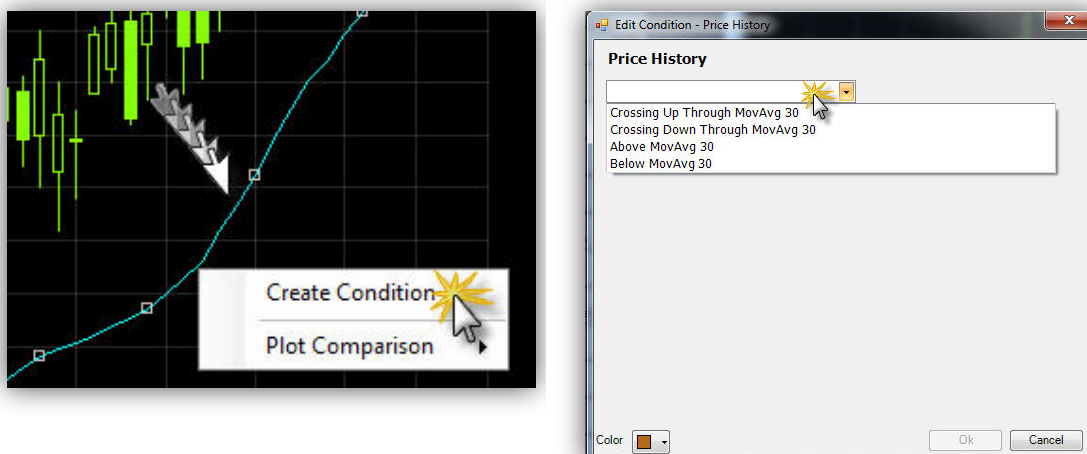
Creating a Basic Individual Condition
There are two methods for creating a condition, which define the behavior you're looking for.

1. Right-click any indicator whose behavior you're interested in studying.   Select *Create Condition* from the menu provided.   Within the *Edit Condition* dialog, use the behavioral drop-down and indicator parameter fields to accurately describe the behavior you're interested in isolating.   Once the behavior is defined, assign a color to the condition, and select *OK* to close the dialog and add the condition to the chart.
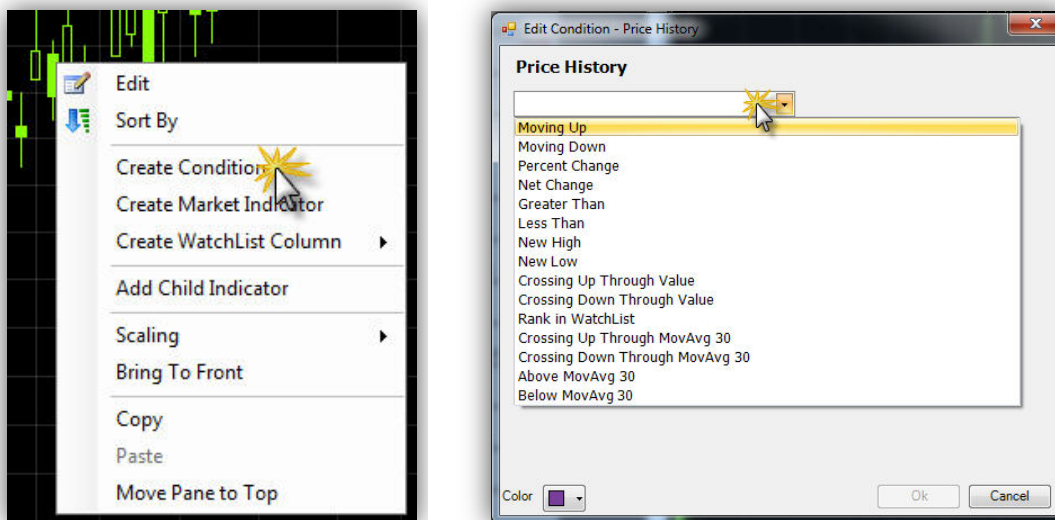
2. If you're interested in isolating a behavior relevant to the relationship between two indicators - i.e. One indicator crossing another, one indicator above another indicator, etc. - plot both indicators.   Drag one indicator on top of the other using the mouse cursor.   Once you see the *Compare* tooltip, release the mouse cursor.   Select *Create Condition* from the menu provided.   Within the *Edit Condition dialog,* use the behavioral drop-down and indicator parameter fields to accurately describe the behavior you're interested in isolating.   Once the behavior is defined, assign a color to the condition, and select *OK* to close the dialog and add the condition to the chart.

Creating a Combination Condition (from two or more individual conditions)
It is possible to combine individual conditions such that they become one.   A combination condition requires that each conditional behavior included be exhibited simultaneously in order for the combination condition to be met.

There are two methods for creating a combination condition.

1. If all of the conditions to be combined are active and visible on the chart, drag one condition on top of another that is to be included in the combination condition.   When you see the *Combine Conditions* tooltip, release the mouse cursor.   Select *Create New Combo Condition* from the menu provided.   The *Edit Combo Condition* dialog appears.   If there are other conditions that should be added to the combination condition, either drag the conditions from the chart into the *Edit* dialog, or use the *Add Condition* button provided within the dialog to add any additional conditions to the combination.
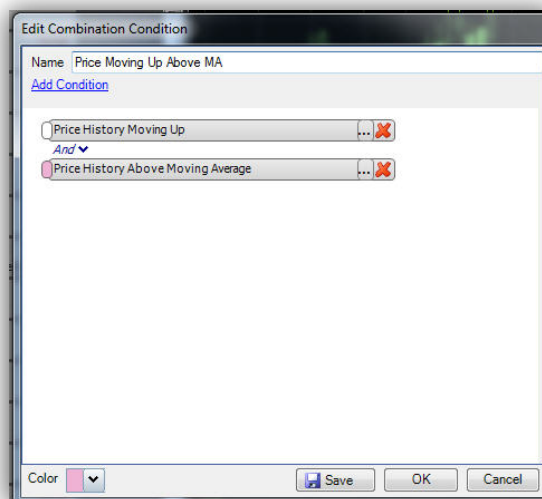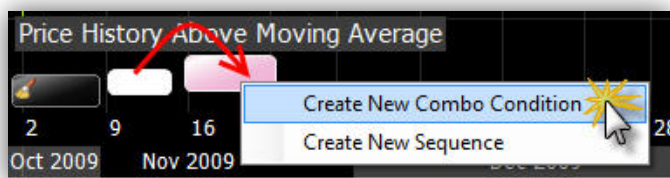
Provide a name for the combination condition; select a color for the condition; then select *OK* to close the dialog and add the combination condition to the chart.   Note that once a combination condition has been formed, its individual conditions are no longer shown independently on the chart.   You may choose to save the combination condition for later use within the *Edit* dialog.   To edit the combination going forward, right-click the condition at any time and select *Edit* from the menu provided.

2. Alternatively, you may choose to initiate a combination condition from the *Add Indicator/Condition button*.   Select *New Combo Condition* from the *Add Indicator/Condition* menu.   To add conditions to the combination condition, either drag the conditions from the chart into the *Edit* dialog, or use the *Add Condition button* provided within the dialog to add any desired conditions to the combination.
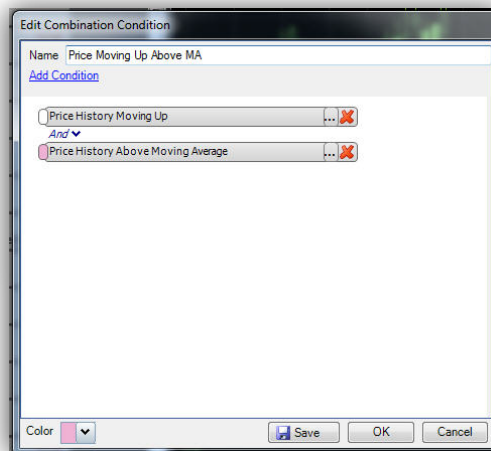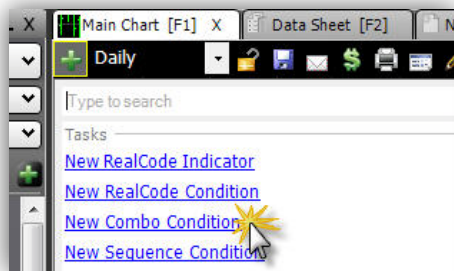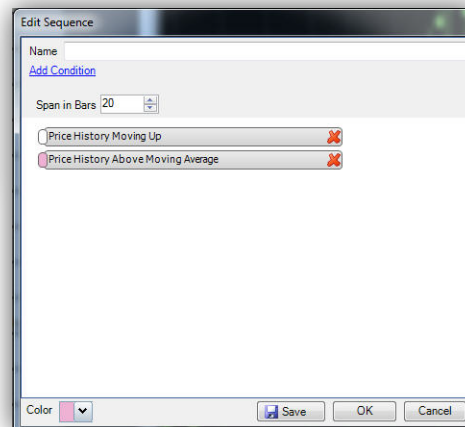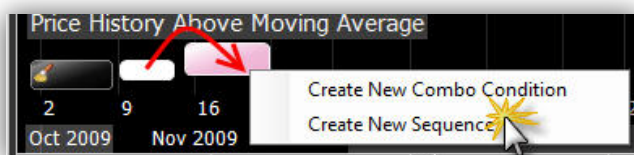
Provide a name for the combination condition; select a color for the condition; then select *OK* to close the dialog and add the combination condition to the chart.   Note that

once a combination condition has been formed, its individual conditions are no longer shown independently on the chart.   You may choose to have the combination condition for later use within the *Edit* dialog.   To edit the combination going forward, right-click the condition at any time and select *Edit* from the menu provided.

Creating a Sequence Condition (from two or more individual conditions)
It is possible to define a sequence condition such that its individual conditions must occur in sequence in order for the sequence condition to be met. There are two methods for creating a sequence condition.

1. If all of the conditions to be included in the sequence condition are active and visible on the chart, drag the first condition that must be met on top of the second that must be met.   When you see the *Combine Conditions* tooltip, release the mouse cursor.   Select *Create New Sequence Condition* from the menu provided.   The *Edit Sequence Condition* dialog appears.   If there are other conditions that should be added to the combination condition, either drag the conditions from the chart into the *Edit* dialog (make sure you drag them in order of sequential importance), or use the *Add Condition button* provided within the dialog to add any additional conditions to the sequence condition.

Provide a name for the sequence condition; select a color for the condition; make sure that the *Span in Bars* is set to an appropriate value; then select *OK* to close the dialog and add the sequence condition to the chart.   Note that once a sequence condition has been formed, its individual conditions are no longer shown independently on the chart. You may choose to save the sequence condition for later use within the *Edit* dialog.   To edit the sequence going forward, right-click the condition at any time and select *Edit* from the menu provided.

> Note: *Span in Bars* is a term used to describe the largest number of bars (sequential plot values) allowed in order for all of the sequence conditions listed to have occurred in the order specified. If all of the events must have been identified in order within three bars on the chart, the *Span in Bars* number specified should be 3.

2. Alternatively, you may choose to initiate a sequence condition from the *Add Indicator/Condition button*.   Select *New Sequence Condition* from the *Add Indicator/Condition* menu.   To add conditions to the sequence condition, either drag the conditions from the chart into the *Edit* dialog, or use the *Add Condition* button provided within the dialog to add any desired conditions to the sequence.
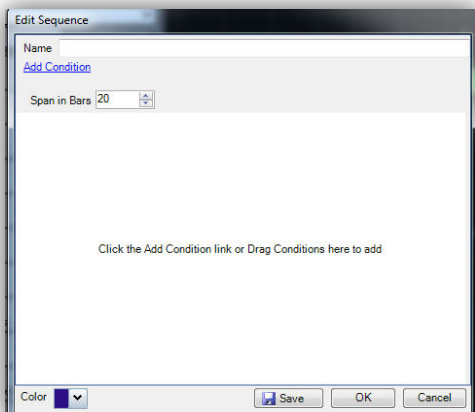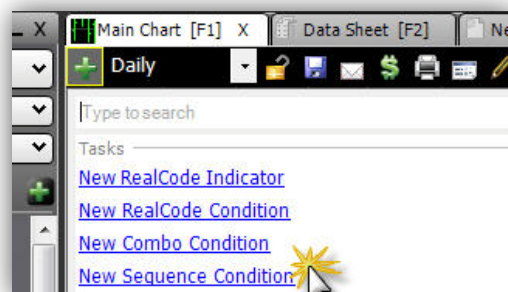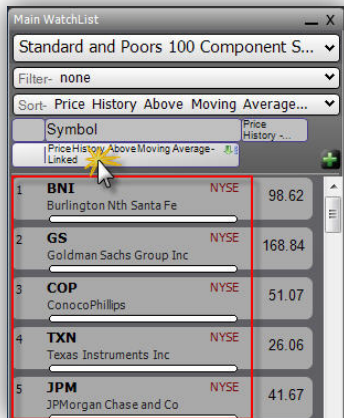

Provide a name for the sequence condition; select a color for the condition; make sure that the *Span in Bars* is set to an appropriate value; then select *OK* to close the dialog and add the sequence condition to the chart.   Note that once a sequence condition has been formed, its individual conditions are no longer shown independently on the chart. You may choose to have the sequence condition for later use within the *Edit* dialog.   To edit the sequence going forward, right-click the condition at any time and select *Edit* from the menu provided.

SORTING BY A CONDITION

To Sort by a Condition -

Any unsaved condition from a chart may be used to sort a WatchList, identifying the items in the list that pass the condition. Drag a condition from the chart into the symbol area of a WatchList. Select either *Sort* or *Condition Column* from the menu presented. *Sort* creates a temporary sort column which will be replaced the next time you request a temporary sort column for any reason. *Condition Column* creates a permanent (until you delete it) column with lights that identify the items in the list that pass the condition.

A previously saved condition can be used to create a sort column within a WatchList as well. If the saved condition is visible on an active chart, you may use the method described above to create a sort column. If the previously saved condition is not currently visible on a chart, select the *Add Column* button located in the top-right corner of the WatchList header area. Manually locate the desired condition from the list or type the name of the desired condition to limit the list of available conditions by keyword. The column created identifies the items within the list that pass the selected condition. The column created is a permanent column (until you delete it).

Note: **a WatchList sorted in descending order by a condition identifies those items within the list that currently pass the condition with a light that matches the color of the condition. Items within the list that do not currently pass the condition are listed in order of the item that most recently did pass the condition but no longer does. This ensures that while some items in the active list may not currently pass the conditional criteria you've identified, you'll be able to easily identify those that most recently exhibited the behavior.**

FILTERING USING A CONDITION

Filters are conditions or groups of conditions that are used to narrow a WatchList to only those items that meet the listed criteria. Once a filter is created, it is stored permanently (unless you delete it) for future use.

To create a filter, select the *Filter Drop-down,* and from the menu provided, select *Create New Filter*. One or more conditions may be added to the filter using the *Add Conditions to Filter* button provided within the *Edit Filter* dialog. It is possible to add previously saved conditions to a filter or to initiate a new condition for the filter by selecting an indicator from the *Add Conditions to Filter* menu. Once all desired filter conditions have been added, select the update frequency for the filter using the *Run Every* field. Select *Run Filter* to activate the filter and to close the *Edit Filter* dialog. The active WatchList should be limited to those items that pass all filter conditions.
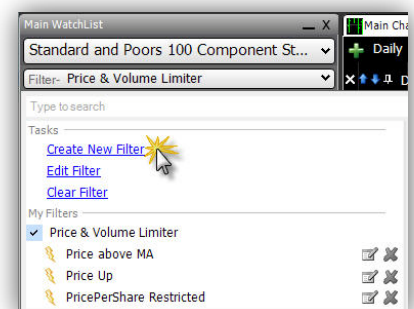
When a filter is active, select the *Filter Drop-down* to create a new filter, or to *Edit* or *Clear* the active filter.

Note: Saved filters are automatically saved to the following file directory on your computer:
Documents\StockFinder5\YourUsername\MyFilters

Creating Indicators and Rules using RealCode

The following items can be created using RealCode:

**Indicators -** (plots on chart)
Conditions - (true/false conditions to scan, filter, color or backtest)
Paint Schemes - (indicator coloring based on code or a condition)
Scans - (via RealCode conditions applied to a WatchList)
Filters - (via RealCode conditions applied to a WatchList)
Sorts - (via RealCode Indicators or conditions applied to a WatchList column)
BackScanner entry or exit condition - (RealCode condition applied to entry/exit rule)

Indicators and conditions can also be added to any WatchList to perform a scan, sort or filter. You can treat a RealCode indicator or condition like any other indicator or condition in that it can be used in other conditions, index calculations, scans, sorts, back testing etc. Anything you can do with a regular indicator/condition in StockFinder can also be performed with a RealCode indicator /condition.

REALCODE INDICATORS

Select the *Add Indicator/Condition to Chart* button; select *New RealCode Indicator*.   Provide a name for the indicator when prompted.
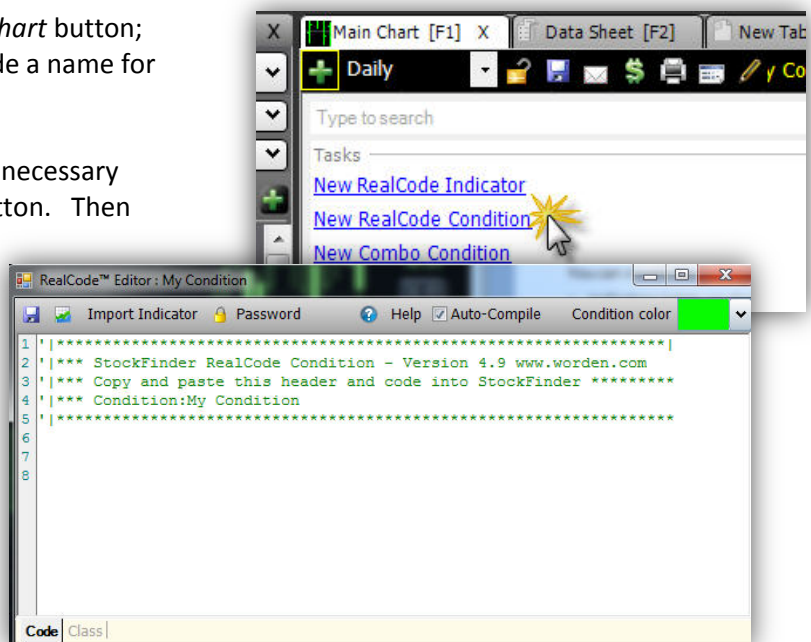
Within the *RealCode Editor*, create any necessary variables using the *Import Indicator* button.   Then write necessary code within the empty *Editor* field.   Refer to the **RealCode Reference** document for more information and help regarding RealCode.
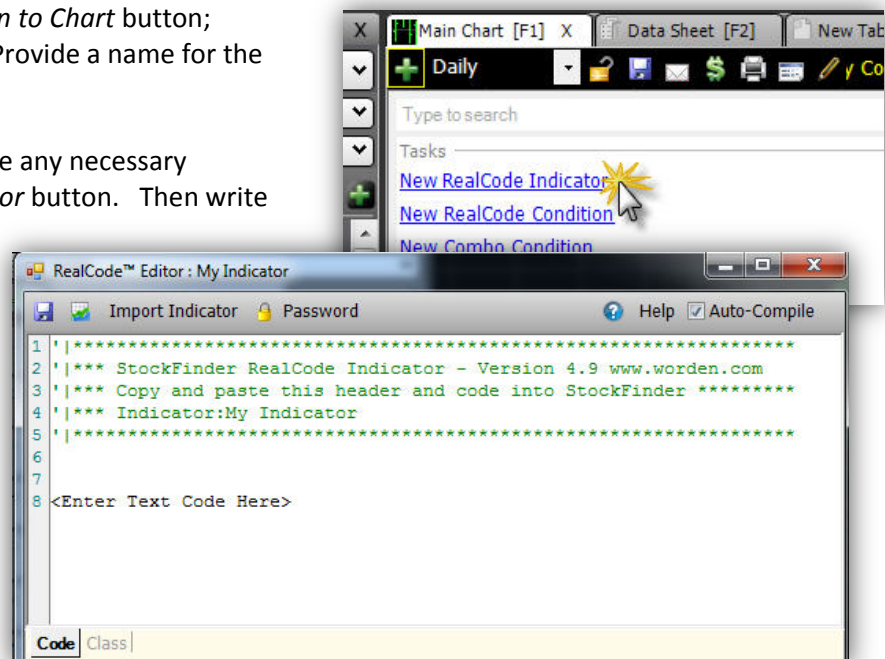
REALCODE CONDITIONS

Select the *Add Indicator/Condition to Chart* button; select *New RealCode Condition*.   Provide a name for the condition when prompted.

Within the *RealCode Editor*, create any necessary variables using the *Import Indicator* button.   Then write necessary code within the empty *Editor* field.   Refer to the **RealCode Reference** document for more information and help regarding RealCode.

REALCODE PAINT SCHEMES

Left-click the indicator to be painted.   Within the *Edit Indicator* dialog, select the *Paint Scheme drop-down*.   Select *New Paint Scheme* from the menu provided.

Provide a name and a base color for the paint scheme; then select the *Apply RealCode* check box. Within the *RealCode Editor*, create any necessary variables using the *Import Indicator* button.   Then write necessary code within the empty *Editor* field. Refer to the **RealCode Reference** document for more information and help regarding RealCode.
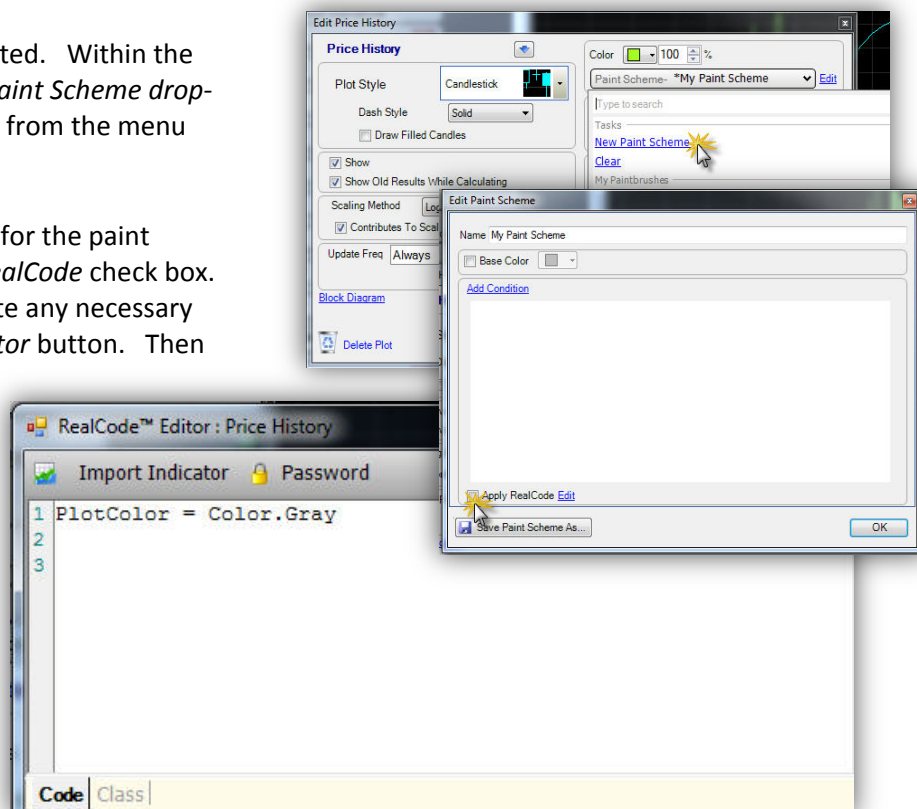
Additional Resources

RESEARCH MENU

Browsers

StockFinder has the ability to add relevant financial or news websites as an integrated part of any Layout. A library of various financial and market websites which can be integrated into a Layout is available in StockFinder.

Many of the browsers in the library are symbol specific pages from websites. Those that are symbol specific automatically synchronize to the active symbol in the WatchList. As the symbol is changed, the browser loads the page from the specific website with the information for that symbol.

To access the library of pre-constructed websites, click on the Research menu and choose Browsers. This opens the browser library. Simply choose the desired browser and it will be tabbed with the chart in the Layout.

To access the library of pre-constructed websites, click the *Browser* icon from the *QuickAccess Menu*. This opens the browser library. Simply choose the desired browser and it will be tabbed with the chart in the Layout.
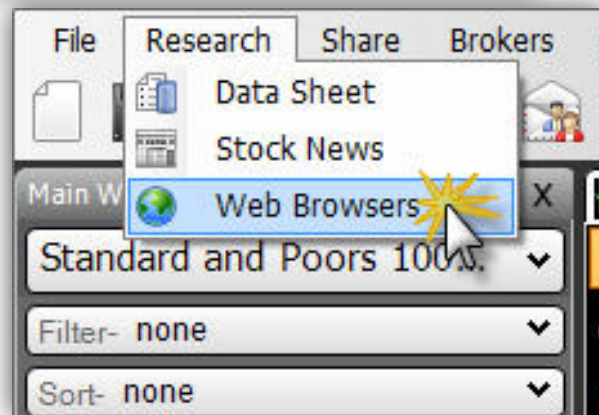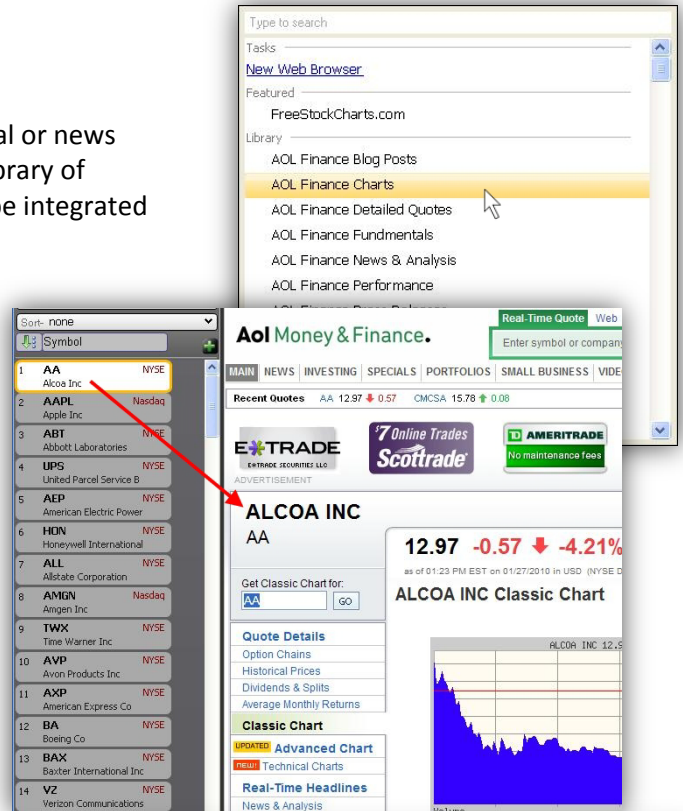
Adding a Web Browser to a Layout

To create and add a personally selected website in StockFinder, choose either method described above to open the Web Browser Library. Select New Web Browser from the menu provided. This opens a new web browser template tabbed with the Main Chart in the Layout.

Address the new web browser template to the desired website by adding the URL to the address field.

Add {sym} to any URL to force a symbol-specific site to navigate automatically to the Active StockFinder Symbol. For example:
**http://finance.aol.com/usw/quotes/news?more=blogs&&exch=USA&sym={Sym}**
This will load the AOL news for the Active Symbol in StockFinder as the Active Symbol changes.

To rename the new browser's tab, right click on the browser tab and choose rename. Type the new name for the browser in the field provided. Click OK.

Deleting a Web Browser from a Layout

To remove any browser page, click on the **X** at the top-right corner of the browser tab.
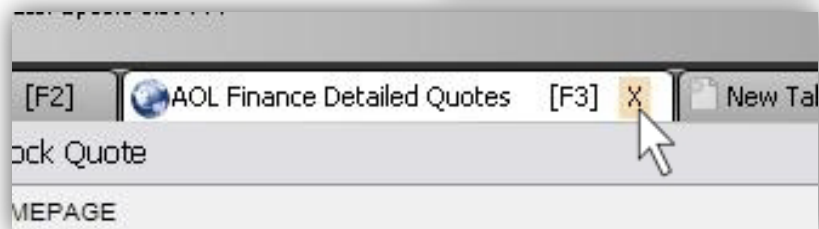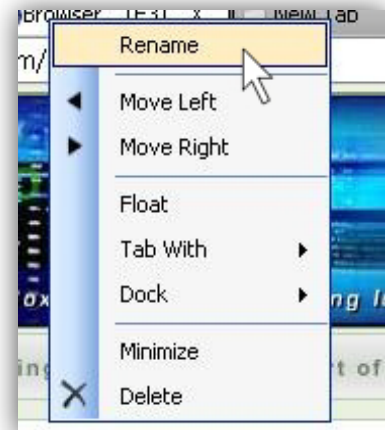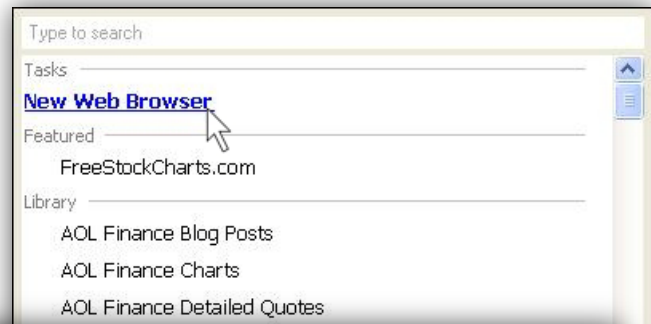
NOTE: A custom browser you create must be saved as part of your Layout and will not be part of the browser library.

Data Sheets

StockFinder provides a detailed list of current fundamental values for each US equity covered. A Data Sheet is included in the Default Layout; it is tabbed with the Main Chart. The Data Sheet looks similar to the graphic displayed below.
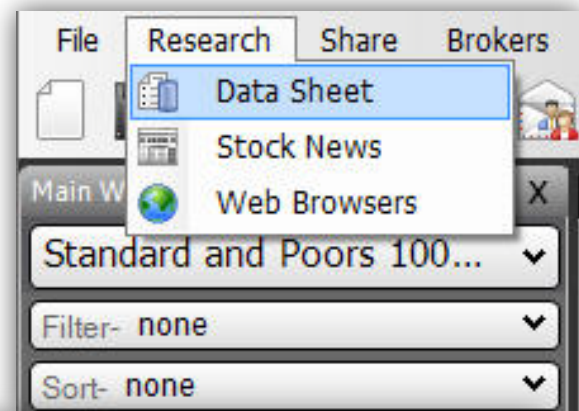

Adding a Data Sheet to a Layout

To add a Data Sheet to a Layout, click the *Research Menu* and choose *Data Sheet* from the menu provided. This adds a Data Sheet to the Layout, tabbed with the Main Chart.

As an alternative, select the *Data Sheet* icon in the *QuickAccess Menu*. This tabs a Data Sheet with the Main Chart. (If a Data Sheet is already tabbed with the Main Chart this icon will hide the data sheet.)

Deleting a Data Sheet from a Layout

To remove any data sheet, click the **X** at the top-right corner of the browser tab.

A list of Data Sheet fields and their definitions follows.

30 Day Price Trend vs. Market—the 30 day trend of a stock vs. the 30 day trend of the Market

5 Day Price Trend vs. Market— the 5 day trend of a stock vs. the 5 day trend of the Market

Accumulated Depreciation and Depletion—the accumulated amount of wear and tear or obsolescence charged against the fixed assets of a company. Accumulated Depletion is a reserve set up to compensate for the reduction in value of a natural resource as it is exhausted or depleted.

Asset Turnover— revenue divided by the average of total assets from the most recent two balance sheets. It measures the ratio at which each dollar of assets will generate a dollar of revenues.

Beta—the coefficient which measures the volatility of a stock's returns relative to the market (S&P 500). It is based on a 36/60-month historical regression of the return on the stock onto the return on the S&P 500.

Capitalization— the latest close price times the number of shares outstanding for that particular class of stock. Current Market Value is also called "market capitalization."

Common Stock Equity—the amount of shareholders equity attributable to common stock. This figure taken from the annual or quarterly reports.

Cost of Sales—includes all expenses directly associated with the production of goods or services the company sells (such as material and overhead) excluding depreciation, depletion, amortization, and SG&A.

Current Book Value Per Share— latest common equity (book value) divided by the most recent common shares outstanding.

Diluted EPS from Total Operations—the earnings from total operations (continuing operations + discontinued operations) divided by the common shares outstanding adjusted for the assumed conversion of all potentially dilutive securities.

Dividend Growth Rate 5-Yr— the compound (shows accrued interest/dividend re-invested) annual dividend 5 year growth rate. The units are in percentages.

Dividend Yield— the latest dividend divided by the share price. It reads in percentage.

EPS Latest Qtr—Fully Diluted earnings per share from Total Operations, as taken from the latest 3-month ending period.

EPS Percent Change (Latest Q)— the percentage change in earnings per share from the comparable quarter a year before. Timely stocks will usually have strong recent quarterly earnings to validate the annual earnings strength. This reads in percentage.

EPS Percent Change (2nd Q back)— the percentage change in earnings per share from the comparable quarter a year before.

EPS Percent Change (3rd Q back)— the percentage change in earnings per share from the comparable quarter a year before.

EPS Percent Change (4th Q back)— the percentage change in earnings per share from the comparable quarter a year before.

EPS Percent Change (Latest Yr)— the percentage change in earnings for the latest 4 quarters compared to the preceding 4 quarters. An appropriate criterion to include in many types of screens. Also a common criterion to sort by, with the best earners on top.

Exchange—the primary U.S. exchange that the security trades on.

Gross Fixed Assets (Plant, Property and Equipment)—the original purchase price of the fixed assets of a company.

Gross Margin—As reported by the company on the face of the Income Statement. If not reported, this field is not calculated and is left as zero.

Gross Operating Profit—the operating revenue minus cost of goods sold. Gross profit identifies the amount available to cover other operating expenses before depreciation.

High Price Divided By Earnings Ratio—the fiscal year high price divided by the fiscal year earnings from total operations (not including extraordinary items).

Latest Float—Shares outstanding minus shares held by insiders. (Reported in 1000's.)

Latest Net Profit Margin— the after-tax Net Income from Total Operations of the latest 4 quarters, divided by the latest 4 quarters Operating Revenues.

Latest Short Interest Ratio—the short interest shares divided by average daily volume, representing the number of days of average trading needed to cover the shorts.

Latest Total Net Income—includes all the operations (continuing and discontinued) AND all the other income or charges (extraordinary, accounting changes, tax loss carryforward, and other gains and losses).

Long Term Debt Divided By Total Capital—the long-term debt divided by total capital (long-term debt + common stock equity + preferred equity as taken from the Balance Sheet).

Long Term Debt to Equity Ratio—the fiscal year Short-term Debt + Long-Term debt divided by the Total Common Equity.

Low Price Divided By Earnings Ratio—the fiscal year low price divided by the fiscal year earnings from total operations (not including extraordinary items).

MoneyStream 1-Year Range— MoneyStream as a % of its one year range. Values of 100 would display MoneyStream at a one year high. Values of 0 would display MoneyStream at a one year low.

MoneyStream 3-Month Range— MoneyStream as a % of its three month range. Values of 100 would display MoneyStream at a three month high. Values of 0 would display MoneyStream at a three month low.

MoneyStream 3-Year Range— MoneyStream as a % of its three year range. Values of 100 would display MoneyStream at a three year high. Values of 0 would display MoneyStream at a three year low.

MoneyStream Surge 1 Week— the net change of MoneyStream over the past week as a % of the range of MoneyStream over the past six months. A value of 90 would mean that 90% of the MoneyStream movement over the past six months happened over the past week.

MoneyStream vs Price 1-Yr. Period— the difference between MoneyStream as a % of its one year range and price as a % of its one year range.

MoneyStream vs Price 3-Mo. Period— the difference between MoneyStream as a % of its three month range and price as a % of its three month range.

MoneyStream vs Price 3-Yr Period— the difference between MoneyStream as a % of its three year range and price as a % of its three year range.

Net Fixed Assets—those assets of a company that are of a relatively permanent nature and are not intended for resale such as property, plant and equipment. The figure is stated as cost minus accumulated depreciation & amortization.

Net Profit Margin (Post Tax)—the fiscal year net income from Continuing Operations and Discontinued Operations divided by the fiscal year revenues, expressed as a percentage.

Operating Cash Flow 1-Yr — the sum of net profit, depreciation, change in accruals, and change in accounts payable, minus change in accounts receivable, minus change in inventories.

Operating Income Before Depreciation (EBITDA)—the operating revenue less Adjustments to Revenue, Cost of Sales, SG&A expense, Advertising and Research & Development.

Optionable Stocks—tells whether or not options can be traded on an equity

Percent Change Revenue 1-Yr— the difference between the revenue from the latest 12 months and the previous 12 months expressed as a percentage.

Percent Change Revenue Last Qtr— the difference between the latest quarter revenue and the revenue for the same quarter one year ago, expressed as a percentage.

Percent Shares Held by Insiders—the percentage of the latest shares outstanding held by insiders of the company.

Percent Shares Held by Institutions—the total number of shares held by institutions divided by the total number of shares outstanding.

Pre Tax Income (EBT)— EBIT minus interest expense, but before subtracting income taxes and adjusting for minority interest.

Price - 3 Year Range— price as a % of its three year range. A value of 100 would display price at a three year high. A value of 0 would display price at a three year low.

Price Growth Rate 1-Yr— the compound annual growth rate of price over the last year, derived using the least squares method.

Price Growth Rate 2-Yr— the compound annual growth rate of price over the last 2 years, derived using the least squares method.

Price Growth Rate 3-Yr— the compound annual growth rate of price over the last 3 years, derived using the least squares method.

Price Growth Rate 5-Yr— the compound annual growth rate of price over the last 5 years, derived using the least squares method.

Price Percent Change 5-Yr— the difference in the current price per share and the price per share 5 years ago expressed as a percentage.

Price to Sales Ratio—determined by dividing current stock price by revenue per share (adjusted for stock splits). Revenue per share for the P/S ratio is determined by dividing revenue for past 12 months by number of shares outstanding.

Price Volatility (Relative Volatility)—a measure of the propensity of a stock's share price to fluctuate widely. This indicator is calculated as follows: The stock's calendar weekly percentage magnitude change over the last 13 calendar weeks is averaged. The stock's final volatility is found by multiplying its average by 10.

Relative Strength 1-Yr (vs SP-500)—the relative change in price of a stock over the past year compared to the change in the SP-500 over the same time.

Return on Assets (ROA)—fiscal year earnings from total operations (not including extraordinary items) divided by the total assets, expressed as a percentage.

Return on Equity— earnings from total operations (not including extraordinary items) divided by common stock equity, expressed as a percentage.

Revenue Growth Rate Last 4 Qtrs—the difference between the latest fiscal year revenue and the previous fiscal year revenue, expressed as a percentage.

Sales Growth Rate 5-Yr—the compound annual revenue per share growth over the last 5 years. This is an indication of growing market share (especially in issues with over 15.93% since the average compound inflation rate for five years in the USA is 15.93%).

Short Term Debt—represents the amount of borrowings (principal and interest) that must be paid in the near future (usually one year).

Total Assets—the summation of all asset items on the balance sheet.

Total Current Assets—cash and equivalents + receivables + inventories + other current assets. It is the total amount of assets considered to be convertible into cash within a relatively short period of time, usually a year.

Total Income Before Interest Expenses (EBIT)—income after depreciation adjusted for interest income, other income, net and any special income/charges but before subtracting interest expense and taxes.

Total Volume Last 13 Weeks—the total number of shares traded in the last 13 weeks.
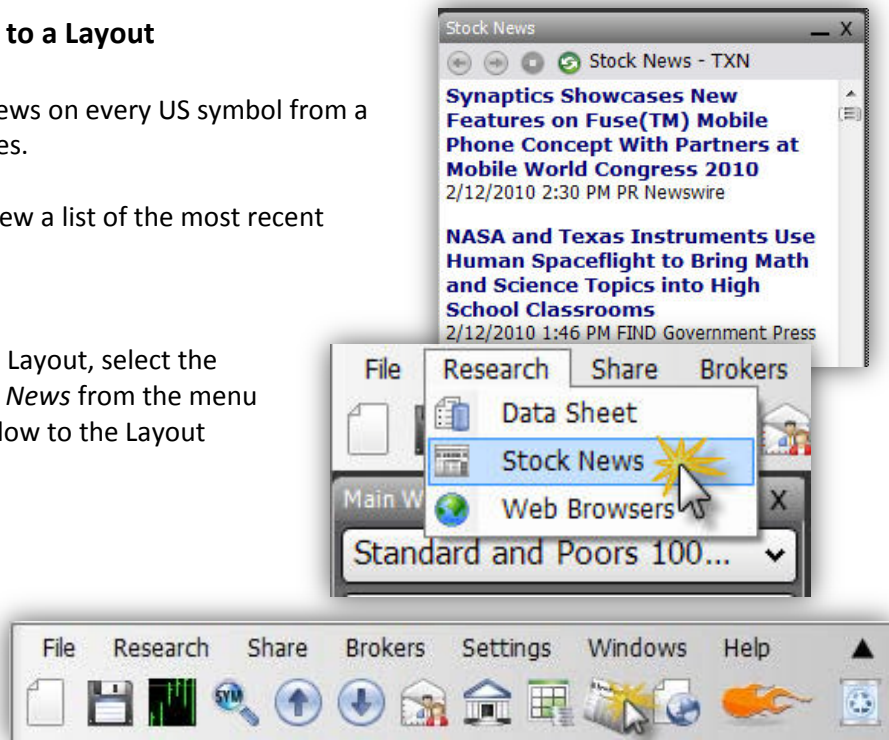
Stock News

Adding a Stock News Window to a Layout

StockFinder supplies streaming news on every US symbol from a composite of over 70 news sources.

Add the *Stock News* window to view a list of the most recent headlines for the active symbol.

To add a *Stock News* window to a Layout, select the *Research Menu* and choose *Stock News* from the menu provided. This adds a News Window to the Layout below the Main WatchList.

As an alternative, select the *Stock News* icon in the *QuickAccess Menu*. This adds a News Window to the Layout below the Main WatchList.

Viewing Individual News Stories from a Stock News Window

To view an individual news story from a Stock News Window, select any headline to see the entire news story.

While in a Stock News Window, review the previous news stories for that symbol by clicking the *Back* button at the top-left of the news story window.

To refresh the list of stock news and load the most recent stories, click the *Refresh* icon at the top of the Stock News Window.
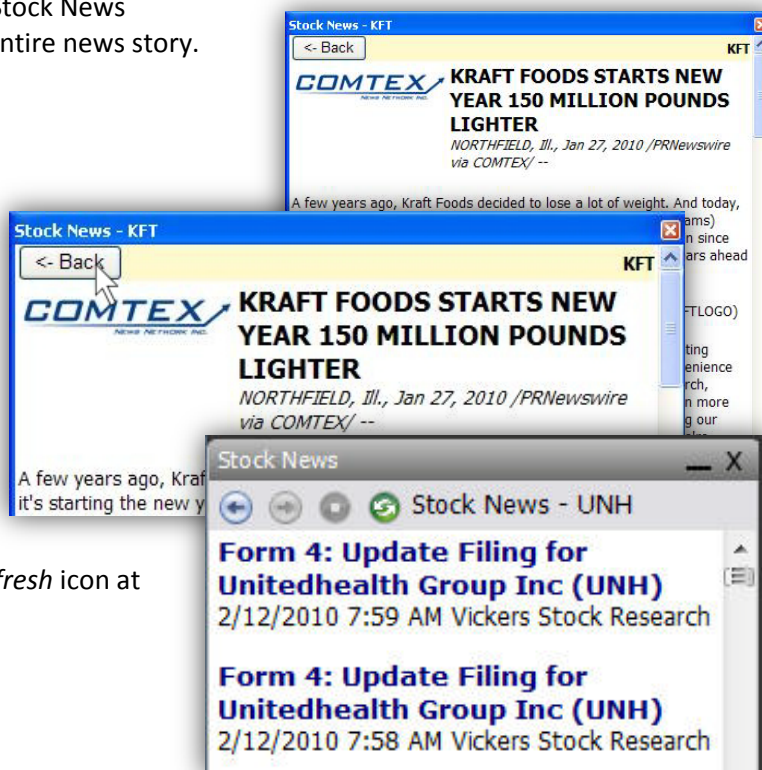
Working with News-Based Indicators

StockFinder offers two unique indicators based on the Stock News feed.

The first news-based indicator is News Buzz. News Buzz acts like a news "surge" indicator in that it calculates how many news stories are occurring on the most recent bar compared to the average historical number of news stories for that particular symbol. High values in News Buzz indicate an unusual number of news stories present for a particular symbol.

The second news-based indicator is News Count. News Count simply calculates how many news stories are occurring on the most recent bar for selected particular symbol.

SCRATCHPAD

Working with ScratchPads

ScratchPad is a feature that allows you to make informal "post-it" notes and reminders and save them in your StockFinder library. A ScratchPad is nothing more than a word processor with editing capabilities that can be added to any Layout within its own window.

Adding a ScratchPad to a Layout

To add a new ScratchPad to a Layout, press the *forward slash key (/)* on the keyboard and start typing any part of the word "Scratch"; then press the *Enter key*. This docks a blank *ScratchPad* below the Main WatchList in the Layout. Simply enter text in the ScratchPad to record a note.
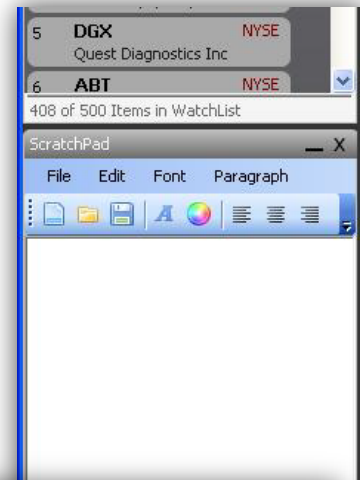
Editing a ScratchPad

Enter text and set desired properties of a ScratchPad with the word processing-style *Edit* menu at the top of the ScratchPad Window.

Editing icons include:

  New - Opens a new blank ScratchPad
  Open - Opens the saved ScratchPad notes in the library
  Save - Saves the current ScratchPad and its contents to the library
  Font - Sets the font properties for the ScratchPad note
  Font Color - Sets a font color for the ScratchPad note
  Justify - Assigns plot alignment. Options include Left, Center, and Right Justify

ScratchPad File Menu
Edit properties: New (opens a new blank ScratchPad); Open (opens the saved ScratchPad notes in the library); Save (saves the current ScratchPad to the library); Save As (saves the current ScratchPad to the library with a new name); Page Setup (set the size, orientation, etc., of the ScratchPad note); Preview (see a preview before printing the ScratchPad note); Print (print the ScratchPad note).
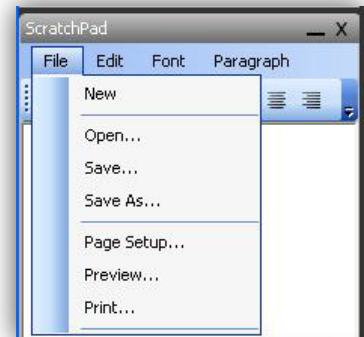
ScratchPad Edit Menu
Edit properties: Undo, redo, copy, cut, paste and insert an image into the ScratchPad note.
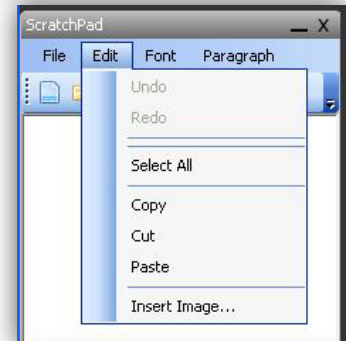
ScratchPad Font Menu
Edit properties: Select font, font color, font style and page color.
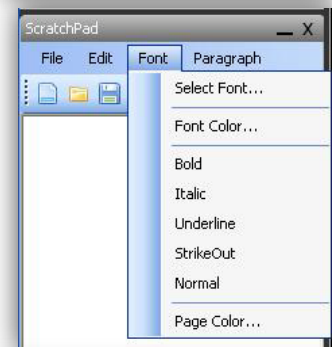
ScratchPad Paragraph Menu
Edit properties: indents and alignment.
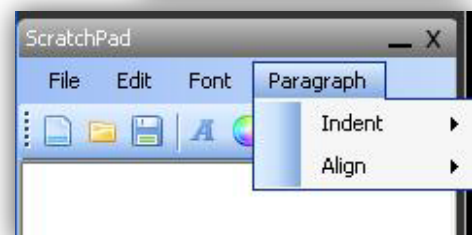
TRADING FROM THE CHART

Logging Into a Brokerage Account

Fully integrated trading in StockFinder is available with TDAmeritrade, optionsXpress and Interactive Brokers. You can trade directly from the charts in any Layout if you have an account with any of the above three brokers. Select the *Login* option from the *Brokers Menu*, and enter appropriate account information to log in to one of the brokerage accounts.
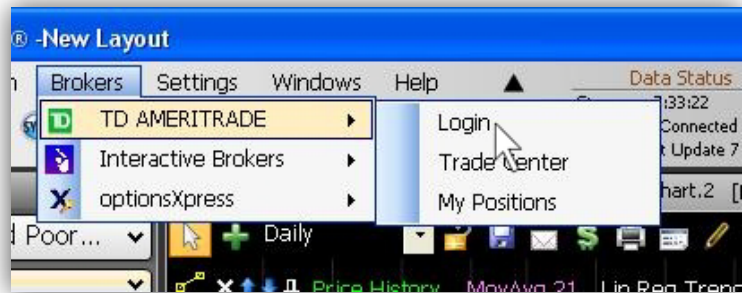
Note: If logging into an Interactive Brokers account, start Trader's Workstation (IB trading platform) first and have it running on your computer. Select the Interactive Brokers Login from the Brokers Menu within StockFinder. Make sure that Trader's Workstation is set to allow incoming and outgoing account information before attempting to trade.
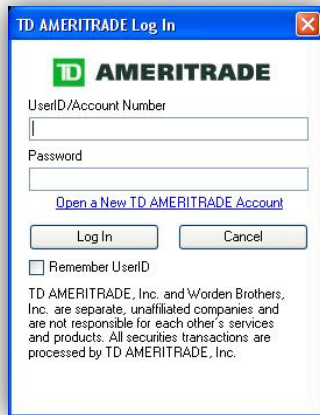
Tracking Open Positions within a Brokerage Account

Once logged into the Broker, a *Current Positions WatchList* is automatically docked below the Main WatchList in the Layout. This reflects the current open trades in the account.

The columns in the *Current Positions WatchList* can be used to sort (or rank) the WatchList by various criteria. Click the *Header* of any column to sort in descending or ascending order. The default columns included are: **Net** (unrealized profit or lost); **Shares** (number of shares in the trade); **Entry Price** (the price at which the trade was initiated).
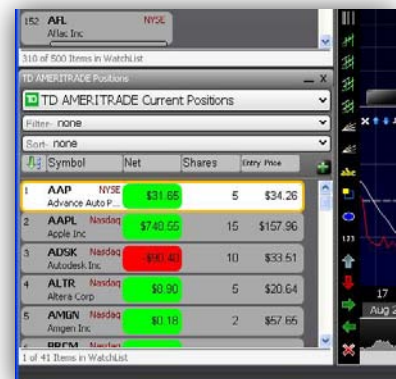
Executing Trades Using the Trade Slider

Once logged into the Broker a Trade Slider area appears to the right of the chart. (You may toggle this area ON/OFF at any time using the Show Broker Trading on Chart (dollar sign) toolbar icon located on any chart.) Any open trades are reflected along the chart's scale by the position of the *Trade Slider*. The current *Net Change* is reflected within the slider, and a red or green bar reflects the movement of the trade - from entry to current Price.

To place a trade using the Trade Slider, left-click within the Trade Slider area to initiate a new *Trade Slider*. Click and drag the slider to the desired trade initiation position. Click the *Trade icon* on the slider (lightning bolt); then select *Show Trade Ticket* to open a modifiable trade ticket.

Within the *Trade Ticket*, set up the desired parameters of the trade. Click *Place Order* to initiate the described trade. To stop the trade process click *Cancel* at any time.

When the confirmation window appears, review the trade and click *Place Order* to initiate the trade.

Once the trade is confirmed, the Trade Slider will flash gray and display a *Submitted* message. Once the trade is placed, the Trade Slider will either be displayed with an *Open (moneybag) icon,* illustrating an open trade *or* a *Cancel icon (x)* to denote a pending trade (e.g. Limit order).
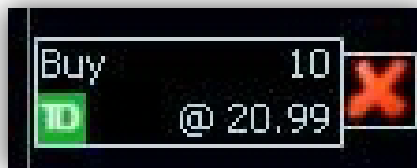
To modify a placed trade that is showing in the Trade Slider area, click and drag the *Trade Slider* to a new position along the Price scale. The *Cancel icon (x)* becomes a *Modify icon*. Click the *Modify icon* to initiate the confirmation screen. Select *Place Order* to **cancel the previous order** and **place an order at the new level**.

To cancel a trade that has not yet been filled, simply click the *Cancel (x) icon* on the *Trade Slider*. Then select *Yes* in the cancel confirmation dialog.
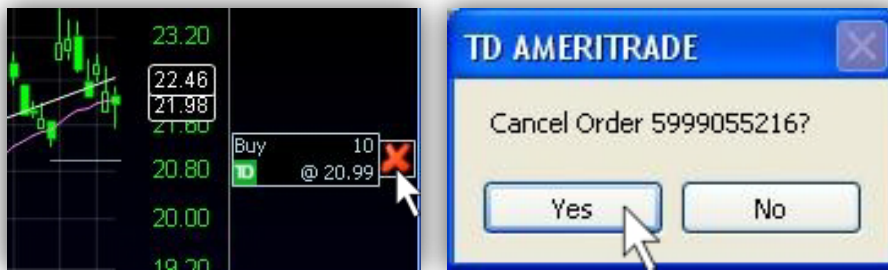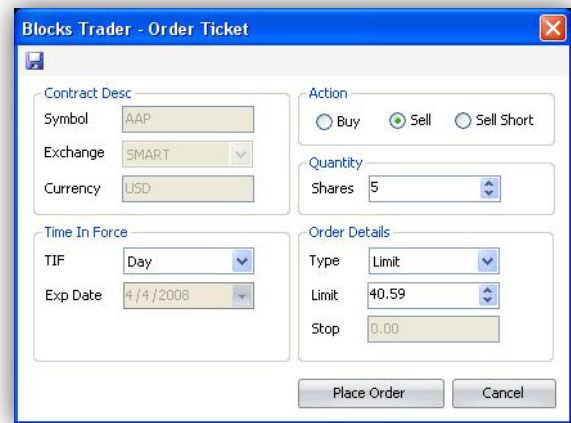

Closing an Open Trade Using the Trade Slider

To close an open trade, click the *Close (Moneybag) icon* on the *Trade Slider*. Choose *Close Out Limit* or *Close Out Market* order.

 On a *Close Out Limit*, set the parameters of the order in the *Trade Ticket* dialog and click *Place Order*.

To *Close Out Market*, click the *Execute (lightning bolt) icon* on the new *Trade Slider* generated by the sell. Set the parameters of the order in the *Trade Ticket* dialog and click *Place Order*.

Adding to an Open Position Using the Trade Slider

To add to an open position, click the *Close (Moneybag) icon* on the *Trade Slider*. Choose *Add to Position*. Set the parameters of the order in the *Trade Ticket dialog* and click *Place Order*.

Accessing a Broker Trade Center

To view the *Trade Center* for any brokerage account being used in StockFinder, select *Brokers | Trade Center* from the *Main Menu*.   The *Trade Center* displays an Overview of the account, a WatchList of all positions and a list of Pending positions. Click any ticker symbol in the *Trade Center* to view its chart in StockFinder.

StockFinder Hotkeys

Chart Shortcuts

1	1 Day Chart Bar Interval
2	2 Day Chart Bar Interval
3	3 Day Chart Bar Interval
4	4 Day Chart Bar Interval
5	Weekly Chart Bar Interval
6	6 Day Chart Bar Interval
7	7 Day Chart Bar Interval
8	8 Day Chart Bar Interval
9	9 Day Chart Bar Interval
Ctrl+1	1 Minute Chart Bar Interval
Ctrl+2	2 Minute Chart Bar Interval
Ctrl+3	5 Minute Chart Bar Interval
Ctrl+4	15 Minute Chart Bar Interval
Ctrl+5	30 Minute Chart Bar Interval
Ctrl+6	1 Hour Chart Bar Interval
. (period key)	Toggle Crosshair
Click blank Chart Area	Activate Temporary Crosshair
[	Shift Chart Back 1 Bar
]	Shift Chart Forward 1 Bar
Ctrl+Shift+Wheel	Shift Chart Back or Forward 1 Bar at a Time
Ctrl + Spin Mouse Wheel	Shift Chart Back or Forward in Time
\	Shift Chart to First Available Plotted Chart Data
Ctrl+D	Draw Trend line
Ctrl+B	Toggle Price Plot Style (bar, candle, line, etc.)
Ctrl+G	Toggle Price Scale
Ctrl+R or /	Add Rule from Library
Ctrl+I or /	Add Indicator from Library
Shift+ 1-9	Zoom Chart In or Out
Spin Mouse Wheel	Zoom Chart In or Out
Shift + Spin Wheel	Slow Zoom Chart In or Out
F1 - F12	View Corresponding Tab within Layout
Ctrl+T	Toggle Drawing Tool Options: 1. Show From All Charts 2. Show from This Chart 3. Hide Drawings
Ctrl+Click (On Chart)	Initiate Last Used Drawing Tool
Ctrl+Click (For a Condition)	Toggle True Markers on Chart
Alt+Click (For a Condition)	Toggle WatchList Sort Column for Condition
Shift+Click (For a Condition)	Toggle Paint Price for Condition

WatchList Shortcuts

Space	Next Symbol In List
Ctrl+Space	Previous Symbol in List
Backspace	Previous Active Symbol
Shift+Space	Next Symbol Passing Same Condition
Home	First Symbol in List
End	Last Symbol in List

Support

If you have general questions about StockFinder or need help setting something up, please navigate your web browser to www.Worden.com. Within the Discussion tab in its top right corner, select the **Ask a Trainer – StockFinder** forum. Make sure you are signed in, and post your question. A Worden representative will post a response as quickly as possible.

Technical Support is available to you for any issues you may encounter while downloading, installing, or operating StockFinder:
Mon - Fri: 9:00 am - 9:00 pm ET
Sat: 9:00 am - 3:00 pm ET
Phone: 919-408-0542
Fax: 919-408-0545

Contact Worden Brothers, Inc. via mail at this address:
Five Oaks Office Park
4905 Pine Cone Drive
Durham, NC 27707

System Requirements

The following are minimum requirements for the successful download, installation, and operation of the StockFinder 5 software.

Windows Vista or Windows 7/8/10 (32/64 bit), Windows Server 2003 (32/64 bit), Windows Server 2008
512 megabytes of memory (RAM) - 1 gigabyte recommended
16 megabytes of hard drive space for application files
1ghz Intel or AMD CPU
200 megabytes to 5+ gigabytes for Market Data (depends on the services and exchanges utilized)
Microsoft .Net framework 3.5
An internet connection to install and update market data

StockFinder 5 Reference