



Sharechart

ShareChart User's Guide

February 2011

Disclaimer

ShareChart is share technical analysis software aiming at providing investors and/or traders a useful tool in analysing shares. It does not take into account any specific investment objectives or financial needs. The contents of the software are not involved in any recommendations or suggestions. Its accuracy and completeness cannot be guaranteed. Sharechart Pty Ltd, its directors and employees do not take any liability for any actions based on ShareChart software, or for any negligent misstatements, errors or omissions. It is recommended that further research and/or consultation with a licensed advisor be made before making an investment decision.

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CHAPTER 1 GETTING STARTED

1.1 INTRODUCTION

ShareChart is a securities (including stocks, options, commodities, and futures) charting analysis software, designed to be a useful tool in your securities investment and/or trading activities.

The software has been developed using the latest object oriented technology that executes faster than other stock analysis software on the market.

ShareChart offers different chart types: line, bar, candlestick, swing and tower, and different chart categories: daily, weekly, monthly, quarterly, yearly, and any combination of days.

You can use ShareChart to work with both real-time and after-close data. You can also classify securities according to security types, industrial sectors, or sort the stocks by volume, price movements, and even fundamentals data such as PE ratio, and ex dividend dates, etc.

ShareChart's technical analysis tools will help you analyze shares under your research. The technical analysis tools include more than sixty popular indicators, a powerful set of drawing tools including Fibonacci Lines and Gan Fan Lines, and price drawing tools such as rice extension, price retracement, and price cycle.

The charting analysis components will analyze active shares according to your input parameters. By running the charting analysis components, you will be presented with a much smaller set of analyzed stocks each day from thousands of stocks, saving you from browsing thousands of stocks.

ShareChart incorporates several derivative models for you to analyze derivatives for underlying securities. You can use option or warrant sorter to sort derivatives by expiry dates, or even intrinsic values. You can use options strategies calculator to find out the best option strategies that suit you.

In addition, ShareChart offers you the alert system on price, your drawing and indicator changes. Watch Folders will allow you to organize your watches in an efficient way. Major market indices, such as Dow Jones, Nasdaq Composite, and Nikkei 225, are included in the ShareChart software. Major commodity prices such as gold and crude oil, and local currencies are also included.

1.2 SYSTEM REQUIREMENTS

The basic requirements for running ShareChart are as follows:

- Pentium 100 and above
- 8 MB RAM (32 MB recommended)
- At least 250 MB hard disk-free space for Australia Data, 1 GB hard disk space for U.S.A Data
- Windows 95, Windows NT, or higher

1.3 INSTALLING SHARECHART

To install ShareChart, Insert the ShareChart Installation CD into your CD-ROM drive. The setup starts automatically.

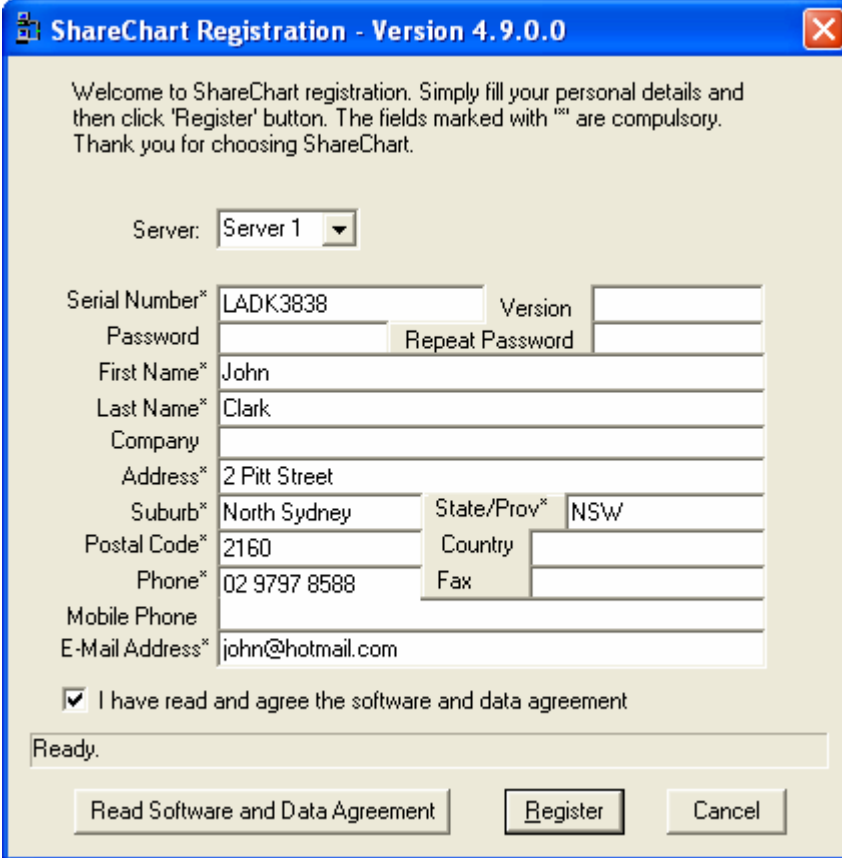
If the auto-run feature is not enabled on your system, Click the Start button and choose the Run command. Type "C:\setup.exe" in the Open box and click the OK button.

Note that "C" represents the letter assigned to your CD-ROM drive. If your drive is assigned a different letter, use it instead of "C".

After the Setup Program has started, just follow the on-screen instructions to install ShareChart.

1.4 REGISTERING SHARECHART

You will need to register in order to use ShareChart. To register online, Make sure you are connected to the internet Click the Start button, go to Programs and ShareChart Choose Register from your ShareChart programs group



The image shows a Windows-style dialog box titled "ShareChart Registration - Version 4.9.0.0". It contains a welcome message and a form for registration. The form includes fields for Server (a dropdown menu set to "Server 1"), Serial Number (LADK3838), Password, Repeat Password, First Name (John), Last Name (Clark), Company, Address (2 Pitt Street), Suburb (North Sydney), State/Prov (NSW), Postal Code (2160), Country, Phone (02 9797 8588), Fax, Mobile Phone, and E-Mail Address (john@hotmail.com). There is a checkbox for "I have read and agree the software and data agreement" which is checked. At the bottom, there is a status bar that says "Ready." and three buttons: "Read Software and Data Agreement", "Register", and "Cancel".

In the Register program, provide detail information in all fields. We strongly recommend you provide a correct email address during registration so that you will be informed of our latest developments.

Once all fields are filled, read software and data agreement and if you have no objections then click "Register" button. If you are not connected to the Internet, the Register program will prompt you for an Internet connection.

On successful registration, you will be able to use ShareChart offline. However, you will need an Internet connection to download data.

TIP: You have only one serial number for registration. This means that you can only use ShareChart at one time.

If you want to use ShareChart on a different computer, first un-register ShareChart by choosing Un-register from ShareChart program group.

Un-registering ShareChart will not erase ShareChart and data from your computer. After un-registering, you can use ShareChart on other computers by registering ShareChart on the computer that you are going to use.

1.5 RUNNING SHARECHART

To run ShareChart, Click programs from the Start menu Click the ShareChare program group, and select ShareChart.


Or, simply double click on the ShareChart icon on your Desktop

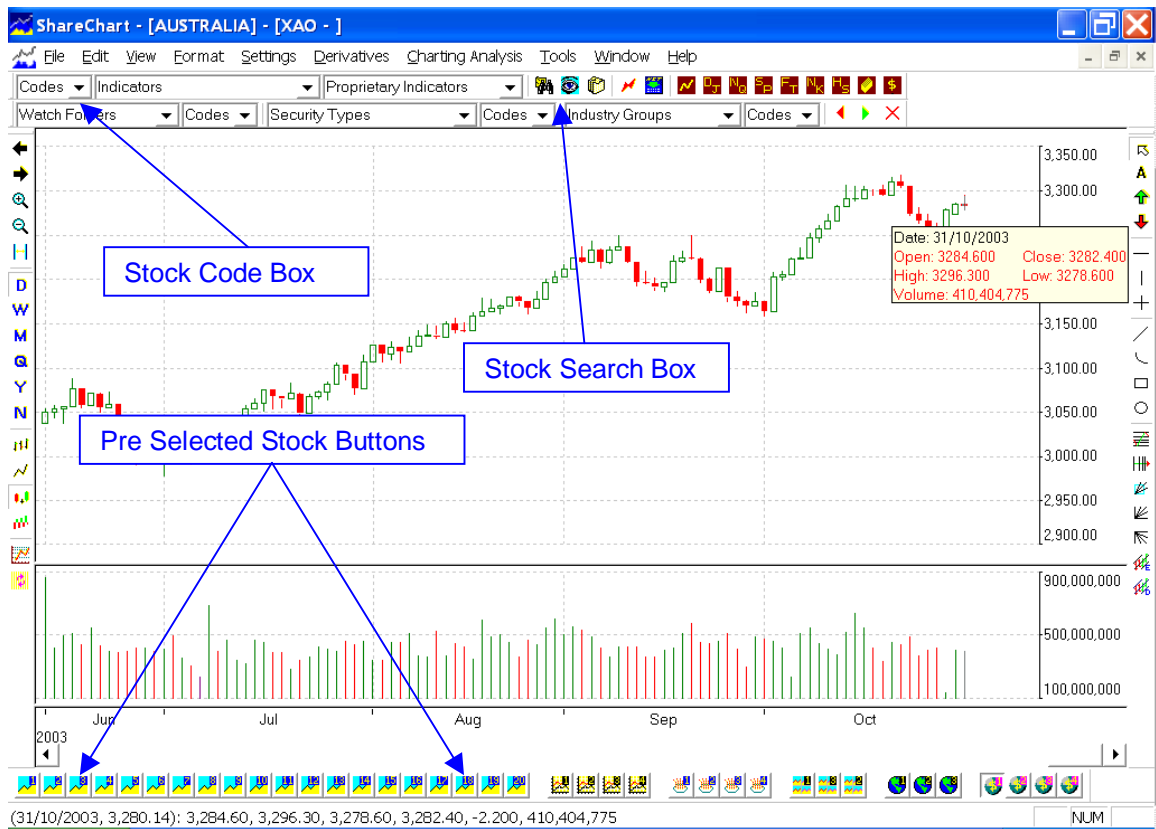


ShareChart.lnk

1.6 VIEWING CHARTS

ShareChart provides many types of charts and data types. Viewing charts is very easy using ShareChart. To view a stock chart you can either:

- 1 Type the Stock code within the stock 'Code' box, or
- 2 Search for the stock by clicking on the search button , or
- 3 Simply click on the Pre-selected Stock Buttons



These features will be addressed further in more details throughout the Users' Guide.

Downloading Data

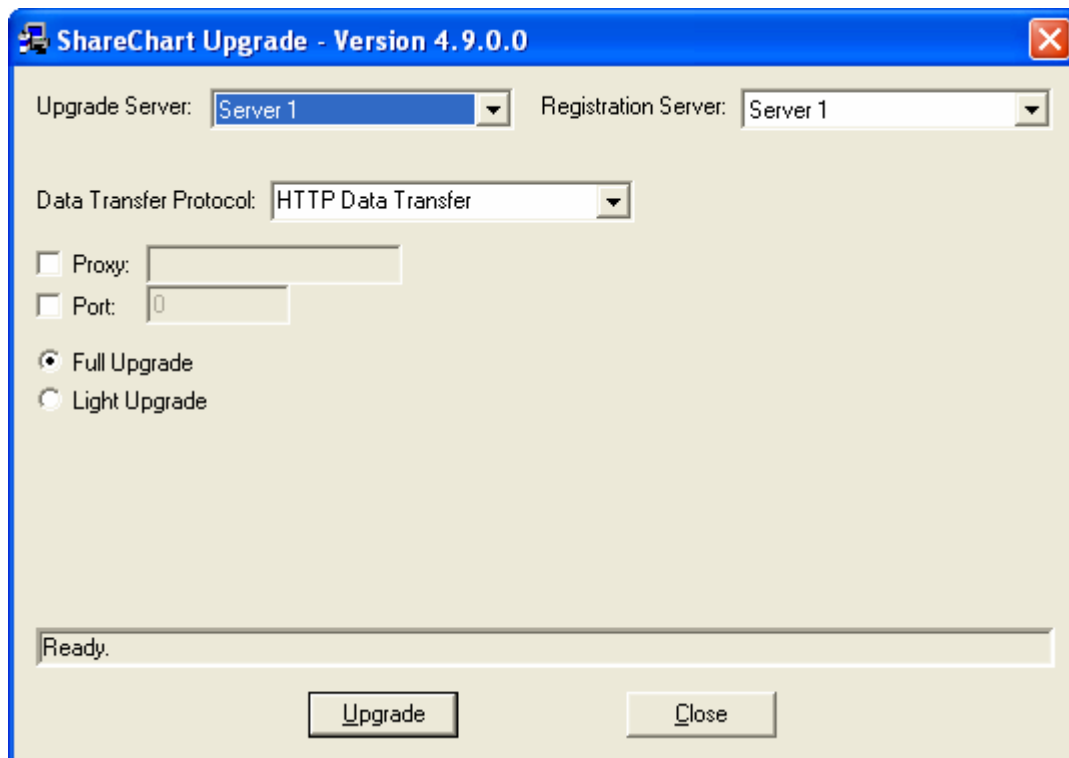
Downloading Data

1.7 ONLINE UPGRADES & TECHNICAL SUPPORT

ShareChart provides online software upgrades that will upgrade the software from the ShareChart data server. This will allow you to upgrade the latest ShareChart with bug fixes and new features.

To access the online upgrade, Click Programs from the Start menu Click the ShareChart programs group, and select Online Upgrade From the ShareChart Upgrade dialog box, click the Upgrade button.

IMPORTANT: You should close all ShareChart programs before beginning an online upgrade.



If you have a question about ShareChart, first look in this manual or online help. If you cannot find the answer, contact Sharechart Technical Support. Sharechart Pty Ltd PO Box 669, Chatswood, NSW 2057 Telephones: +61 2 9419 2990 Mobiles: 0421 287 134, 0410 338 859 Email: support@sharechart.com.au Web site: www.sharechart.com.au


Downloading Data

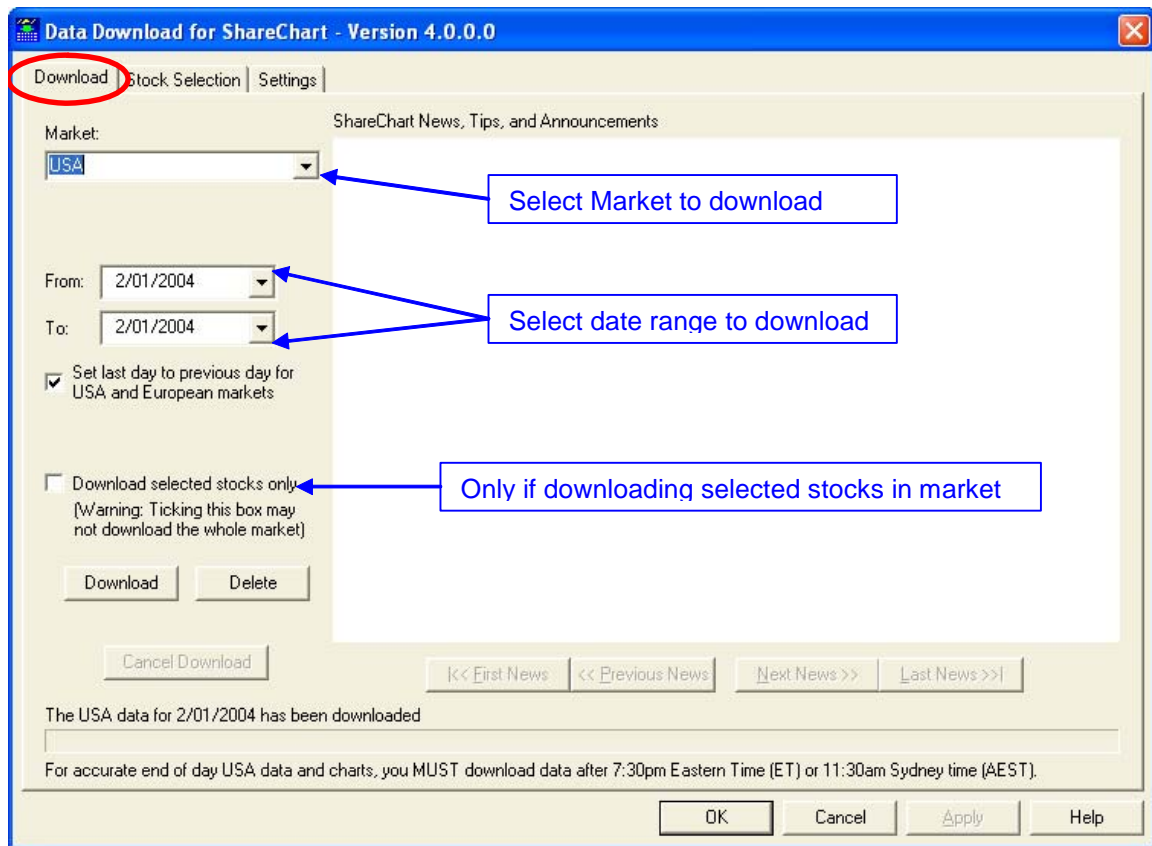
CHAPTER 2 DOWNLOADING DATA

2.1 DOWNLOADING DATA

Remember to regularly download data to keep your data up to date with the latest market movements.

If you do not regularly download data for some reason, you should ensure that the time for downloading period is within the time limit of your Internet service provider (ISP). If you do not know the time limit, please contact your Internet service provider. The downloading period can be set on the Data Download dialog box.


Downloading Data for your charts is a very easy process: Connect to the internet and Open ShareChart Open the 'Data Download Box' by either going to Tools < Data Download or by clicking on the Download button  The following box will appear

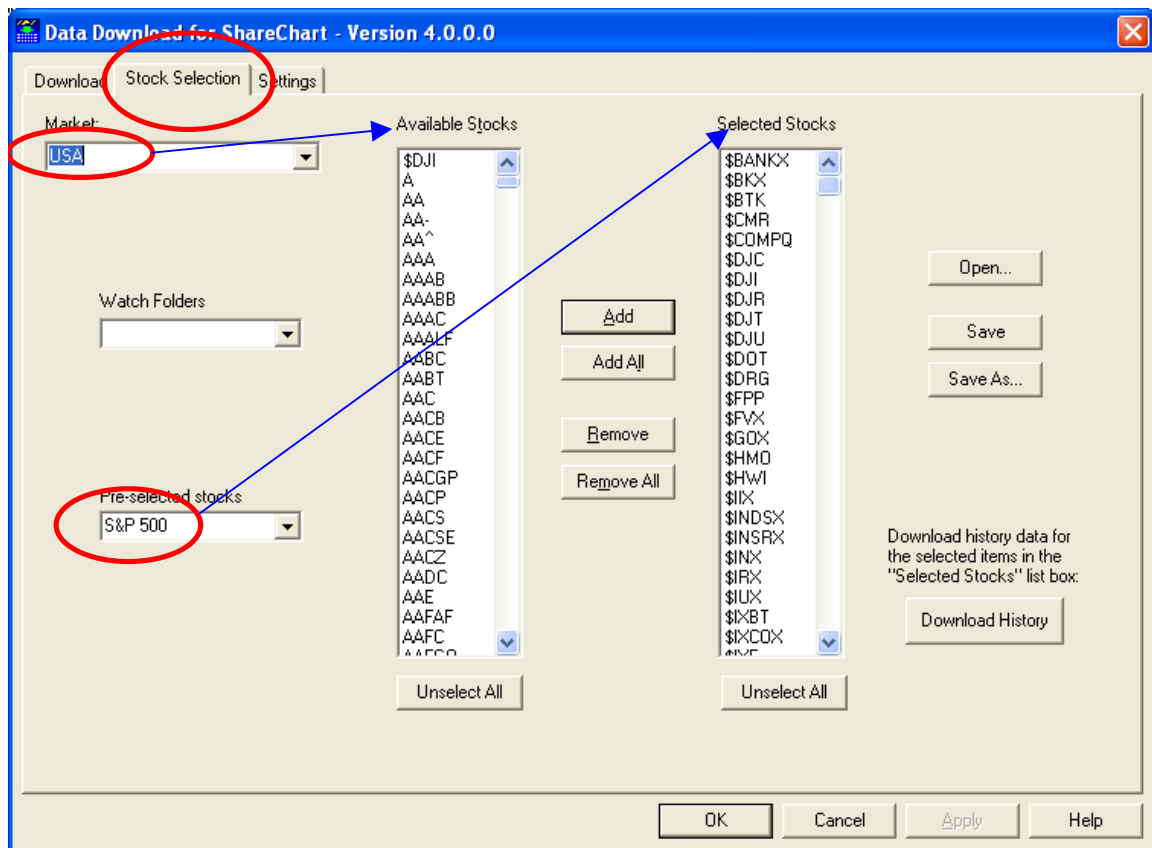


In the above dialog box, select a market, set date range, then click Download button. During downloading, the progress bar will show the progress of downloading. When it completes, it will notify you about the completion. You can then close the Downloader and view charts with the updated data.

2.2 DOWNLOADING SELECTED DATA

In many cases, you may be interested in only a small set of the whole market data. For example: you may only invest or trade in stocks that are in the S&P500 list (which are the top 500 market capitalised stocks in the USA). Therefore, you may not want to download the entire market.

In this scenario, you might want to download those selected stocks only. To do so, Connect to the internet and Open ShareChart Open the 'Data Download Box' by either going to Tools < Data Download or by clicking on the shortcut button  Select the Market, Date Range, Tick 'Selected Stocks Only' box Go to Stock Selection < Pre-Selected Stocks & select S&P500 from menu Go back to Download section and press 'Download' button



In the diagram above, when you select USA as market it will automatically display the entire USA list in your 'Available Stocks' list.

From this 'Pre-selected stocks' list you have chosen as you Pre-Selected Stocks the S&P500 list which will then appear in your 'Selected Stocks' list.

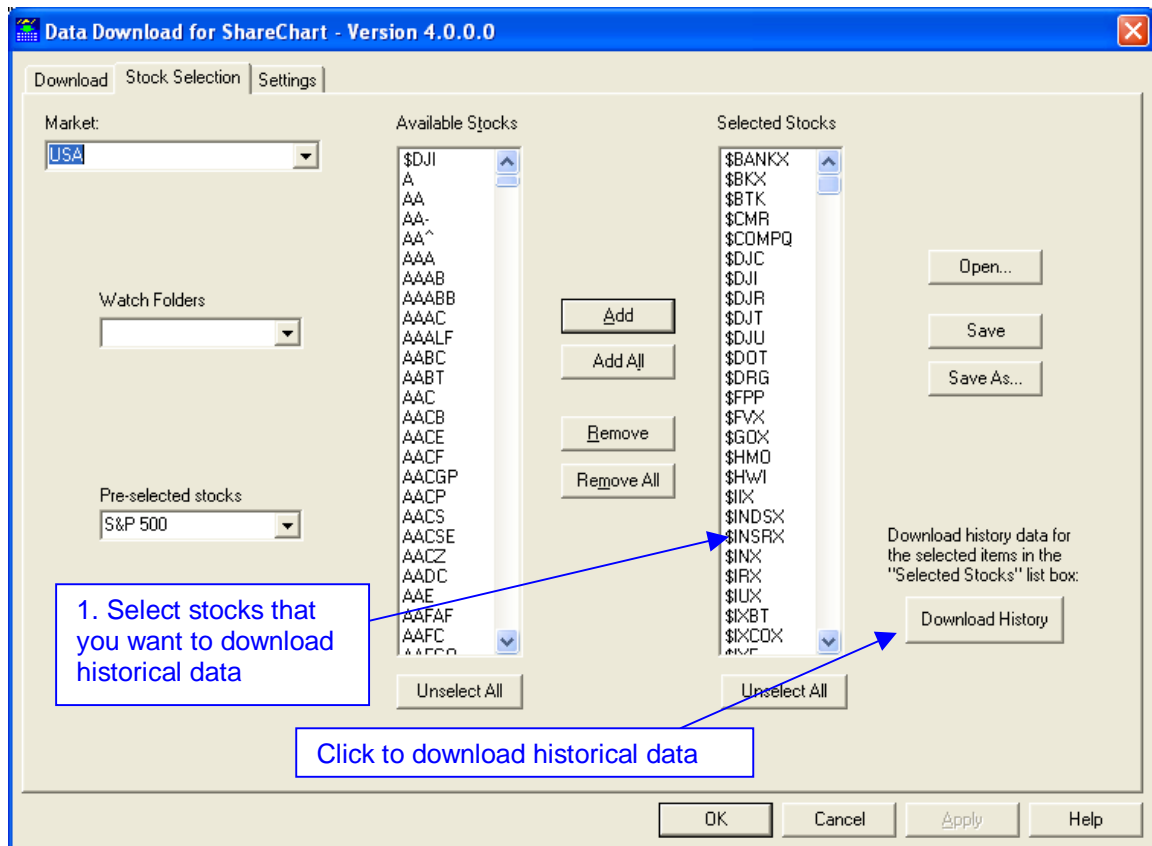
Alternatively, you can download your own self-created list through the 'Watch Folders' section shown above.

Simply, use the 'Add' and 'Remove' buttons shown above to customise your selected stocks list. To do this, highlight the ticker code and either press 'Add' or 'Remove'.

2.3 DOWNLOADING HISTORICAL DATA

With the Data Downloader, you can also download the historical data for a particular stock. This is useful when you decide to add a stock that is not in your selected stocks for a certain period. You will need to download the historical data for the stock as it was not in your selected stocks for downloading. It is also useful to repair data on your hard disk where you can simply download the historical data from our data servers.

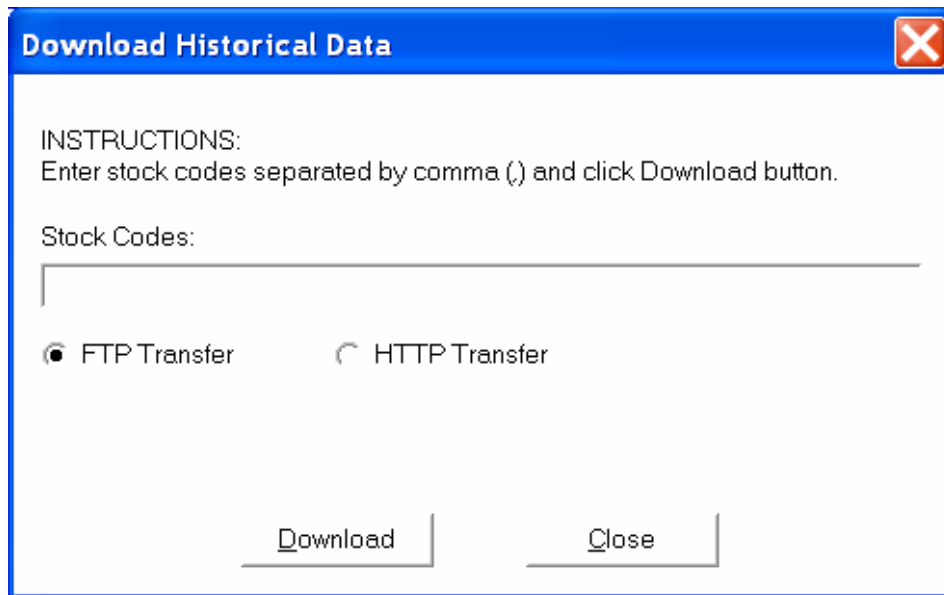
To download the historical data, go to the Stock Selection page. First add the stock into the Selected Stocks list box. Select the stocks that you want to download the historical data in the Selected Stocks list box (you can select multiple stocks by holding SHIFT or CTRL key). Then click Download History button, as shown below.



ShareChart has also provided you with the option to download the historical data. Select Tools < Download Historical Data. The following Download Historical Data box will appear.

Historical Data

Downloading Data




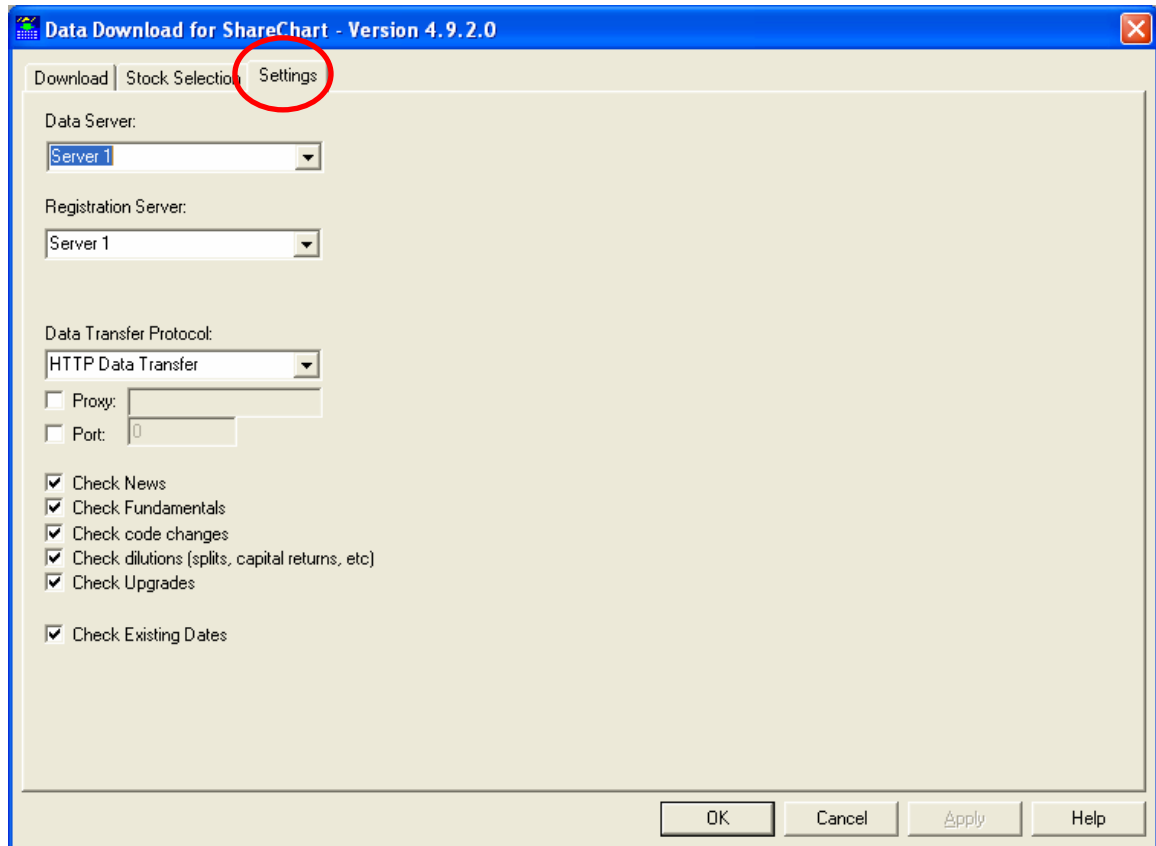
The screenshot shows a dialog box titled "Download Historical Data" with a blue header bar and a red close button in the top right corner. Inside the dialog, the text "INSTRUCTIONS:" is followed by "Enter stock codes separated by comma (,) and click Download button." Below this is a text input field labeled "Stock Codes:". Underneath the input field are two radio buttons: "FTP Transfer" (which is selected) and "HTTP Transfer". At the bottom of the dialog are two buttons: "Download" and "Close".

Type in the stock codes separated by a comma (,) and click on the Download button. Wait for a message box to appear notifying you the completion of the data transfer. Click Close once you have downloaded all the data.

NOTE: To make downloading historical data work properly, you need to make sure that you are in the correct market. For example, if you are viewing US stocks, the historical data for BHP downloaded will be for BHP in the US market but not BHP for the Australian market.

2.4 DOWNLOADING SETTINGS

Normally you do not need to alter the default settings for downloading. However, if you want to change the settings, you can do the following. Open ShareChart Open the 'Data Download Box' by either going to Tools < Data Download or by clicking on the shortcut button  Go to Settings, the following box will appear:



Please choose the following settings:

Server: Server 1

Registration Server : Server 1

Data Transfer Protocol: FTP (if you are running a stand alone computer) or HTTP (if running computer on a network)

It is highly recommended that you have the following settings selected:

- Check News
- Check Fundamentals
- Check code changes
- Check Dilutions (splits, capital returns, etc)
- Check Upgrades
- Check Existing dates

2.5 DOWNLOADING INFORMATION

ShareChart provides a data downloader that will allow you to download end-of-day data for more than twenty five markets. Depending on your subscription, you will be presented with only the markets that you have subscribed. The downloading time depends on your computer and the market subscribed. For example, downloading time for all US stocks on a Pentium III 1G computer will normally be about four minutes, while downloading Australia data will normally take one minute.

Data Downloader is a separate program that is not running in the main process of ShareChart. Therefore, you will see a separate program icon on Windows' taskbar when the Data Downloader has started. You can go back to ShareChart while the Data Downloader is downloading the data.

Downloading data for the U.S.A market will take around 4 minutes depending on the speed of your PC.

The data for USA and Australia markets is updated and is available every ten minutes during market open, allowing you to track the open market. The format of the ten minutes data is same as end of day data. Both are twenty minutes delayed data. For the accurate final data, you should always download the final data after 7:30pm Sydney time for Australia data and 12.30pm Sydney time for USA data.

2.5.1 Downloading Procedure

When it starts, the Downloader will detect the last downloaded date and fill the date range to the current for each market. The current displayed date range is displayed for the selected market. You can edit the date range if the date range is found incorrect. Sometimes you may want to break a long period into smaller sub-periods so that the downloading time for each sub-period will be within the time limit of your Internet service provider.

To start downloading, simply click on the Download button. The Downloader will first check any news for the market that you are downloading. If the news is found, it will then download the news and display in the News window. Otherwise, the title bar on the News window will change to "No Sharechart News, Tips, or Announcements". It then checks for any stock fundamental data, code changes, stock splits, and program upgrade, and download them if they exist. For upgrading, the Downloader will close ShareChart if it is running and perform any necessary post-upgrade processing. After all pre-downloads are processed, it then proceeds to download data for the specified date range. Upon the completion of downloading, the Downloader will proceed to converting data. Once it enters the conversion stage, you can safely disconnect from Internet as it no longer requires any Internet access. The conversion could be lengthy process depending on the data size. The Data Downloader will remember the last successful downloaded date when you close the Downloader.

While price data can be updated daily, the fundamental data is normally updated on a weekly basis and will normally be available on each Monday.

2.5.2 Deleting Downloaded Data

You can delete data for a specified date range by clicking on the Delete button. The Downloader will get your confirmation to proceed with the deletion. This function is useful to delete duplicate data.

2.5.3 Downloading Selected Stocks

The Downloader allows you to download pre-selected stocks instead of the whole market, which will save considerable converting time. To download selected stocks, you should first set pre-selected stocks from the Stock Selection page and then check "Download selected stocks only" on the Download page before you click on the Download button. To select stocks for downloading, open the Stock Selection page. The following Stock Selection page will appear.

First, you need to select a market. All available stocks for the selected market will be displayed in the "Available Stocks" list box. You can then select stocks in the "Available Stocks" list box. You can use the CTRL or SHIFT key to make multiple selections. Click on the "Add" button to add the selected stocks to the "Selected Stocks" list box.

You can save the selected stocks to a file by clicking the "Save" or "Save As" button. Consequently, you can load selected stocks that are saved in a file by clicking on the "Open" button.

For the Australia and USA markets, ShareChart has pre-selected some groups of stocks for you. These groups can be accessed through the Watch Lists and Pre-selected stocks drop down boxes.

If you decide to add some new stocks to your previously selected stocks, you may need to download the historical data. Select the added stocks in the "Selected Stocks" list box, and click on the "Download History" button. You can make multiple selections in the "Selected Stocks" box by holding the CTRL or SHIFT key.

2.5.4 Downloading Major Prices

The Downloader allows you to download major prices instead of the whole market. The major prices include major indices, major commodities, and currencies pertinent to the subscribed market. By downloading major prices, you will save considerable downloading and converting time. This is very useful when you want to view major prices that have not been included in your last end of day data download. For example, when you download Australia end of day data, the major prices for the current day were not available yet. You can then use downloading major prices feature when these prices become available on the next trading day or weekend.

To download major prices, you can simply tick Download major prices checkbox and click Download button. Due to the small size of data, the downloading and converting time is very fast.

2.5.5 Downloading Settings

You can also select which server to download from. This can be achieved by opening the "Settings" page where you can also set data transfer protocols and other settings.

The Downloader provides a selection of data transfer protocols that cater for varying Internet access situations. It is highly recommended that you use the defaults set by the Downloader. In some circumstances you may choose other protocols if you fail to download data using the default protocols. For example, you may use FTP registration verifying protocol or TCP/IP verifying protocol if the Downloader fails at default. Both FTP and HTTP registration verifying protocols will be much slower than TCP/IP verifying

Downloading Information

Downloading Data

protocol. For local network or Internet sharing users, you should use the Default Registration Protocol and HTTP Data Transfer Protocol to download data.

If your Internet access is via a specific proxy or port, you can set it in the Downloader. In most cases, you do not need to worry about them. If this rare case applies to you, you should contact your Internet service provider or your network administrator to obtain those numbers.

You can select whether to check news, check fundamentals, or check for upgrades by ticking the corresponding tick box. This may save you time during downloading if you are not concerned with news, fundamentals, or upgrades.

The "Check Existing Dates" option is always checked when you open the Downloader. This option will allow the Downloader to check whether the downloading date has always been downloaded. If it has been downloaded, it will overwrite the downloaded date. If the "Check Existing Dates" option is unchecked, the Downloader will simply append the downloading date to the end of the stock data without checking the existing date. It would accelerate the downloading speed but will potentially cause duplicate dates in the data, especially for those who download intra-day data. It is highly recommended that you always check this option unless you are absolutely certain that the data you are downloading will not cause duplicate dates.

2.5.6 Download Command Line

You can include Downloader as command line in your batch processing or script. This will allow you automatic the downloading process. The command line for the downloader is as follows.

```
DataDownload.exe -m market
```

Where -m market indicates which market to download. For example, if you download Australia market, you can use the command line: DataDownload.exe -m AUSTRALIA. Once the parameters are included for the downloader, the download box will not appear. It takes your predefined settings in the downloader and automatically forward undownloaded dates for downloading. All data downloading and converting are processed at background.

2.6 DOWNLOADING SERVER PATCH

If one or more of ShareChart data server becomes accessible for any technical reasons, you may go to our website www.sharechart.com.au/downloads.htm to download a server patch file ServerPatch.wsc to ShareChart folder. If you installed ShareChart normally without altering destination folder, ShareChart will normally be installed to folder c:\program files\sharechart.

Instructions on how download server patch to your ShareChart folder is displayed on the download web page. You can simply follow the instructions.

Downloading server patch may also solve the problem with registration or upgrading. The following are the files that you must download when you experience difficulties.

Problem	Download Files
Data Download	ServerPatch.wsc, DataDownload.exe
Registration / Un-registration	ServerPatch.wsc, StoReg.exe, UnReigster.exe
Upgrade	ServerPatch.wsc, StoUpgrade.exe

2.7 ONLINE PAYMENT

Your ShareChart package usually includes up to ten years of historical data plus one year of annual data subscription. When your annual data subscription approaches expiry, Sharechart will send you an email notice notifying your data expiry within a month. You can renew your data subscription by using our online payment facility: go Start < Programs and select Online Payment.

In the meantime, you will also be notified during your data download and you will be asked whether you want to renew. If you click yes, you will be prompted with the following Online Payment dialog box.

OnlinePayment

Instructions

ONLINE PAYMENT

Thank you for using Sharechart secure online payment system. Your online payment is protected by Sharechart secure data transfer.

Please check the appropriate data subscription, provide your credit card details, and click "Submit Payment" button. Upon successful online payment, you will be notified with a receipt number. Please keep your receipt number for any enquiries. A separate receipt will be sent to you by email when the payment is finalized.

Serial Number: LUXY2538

Payment Method: Visacard

Data Subscription:

- ☒ AUSTRALIA 599
- ☒ USA 599
- ☒ HONG KONG 360
- ☐ 0

Payment Details:

Amount: 1558

Credit Card No. 1111222233334444

Name On Credit Card: David Smith

Credit Card Expiry: 06/2008 (mm/yyyy)

Total: 1558

Submit Payment Print Cancel

With this dialog box, select markets that you want to renew, fill in all your payment details, and click "Submit Payment" button. Your payment detail will be sent to our registration server through secure Internet transfer. Once your payment is received and processed our server, a receipt number will be generated and sent back to you with successful payment confirmation. Your payment will then be approved and finalized in the next few days. A written receipt will be sent to your via email once the payment is finalized.

If you prefer to send your payment by post, you can print the payment and send it to the address provided in the "Instructions" of the Online Payment.

At anytime, you can use Online Payment to pay your data subscription. When you launch Online Payment, Online Payment program will send message with your serial number to our registration server. The server will work out whether you need to pay. If the server works out that your payment is up to date, it will send you a message that your

Online Payment

Downloading Data

data subscription is current and you do not need to pay at the current stage. If the server has worked out that you should pay now, will work out how much you need to pay based on your current data subscription. It will then send you detailed payment information on each market subscription. You can then choose which markets to renew. However, if you want to add more markets to your current data subscription, you need to contact our Accounts (accounts@sharechart.com.au) to arrange them.

Sharechart

CHAPTER 3 WORKING WITH CHARTS

3.1 SHARECHART COMPONENTS

ShareChart provides you with four sets of components:

1. Charting components
2. Drawing components
3. Indicator components
4. Charting analysis components
5. Derivatives components

Charting Components

Charting components draw stock price and volume on a basis of:

- Daily
- Weekly
- Monthly
- Quarterly
- Yearly
- N-day

Four types of charts are available:

- Bar chart
- Line chart
- Candlestick chart
- Tower chart
- Swing chart
- Heikin Ashi candlestick chart

Drawing Components

Drawing components allow you to draw lines and annotation on the stock chart. By using the drawing components, you will be able to enhance the stock chart. For example, you can draw components to identify critical points in the price movement such as:

- Support lines
- Resistance lines
- Trend lines
- Turning points
- Text

Indicator Components

Indicator components comprise of a set of technical tools designed to help you to make better trading decisions. These indicators include:

- Trend indicators
- Momentum indicators
- Volume indicators
- Volatility indicators

In addition to popular indicators, ShareChart has its own useful indicators based on the research from the authors of ShareChart.

Charting Analysis Components

Charting analysis components are very useful tools for identifying a set of a few active stocks from thousands of stocks. They will save you a lot of effort in identifying active stocks from browsing thousands of stocks.

ShareChart provides up to nine charting analysis components in the Professional edition:

- Fundamental analysis
- Indicator analysis
- Indicator crossing analysis
- Divergence analysis
- Breakout analysis
- Re-tracement analysis
- Bottom analysis
- Reversals analysis
- Candlestick Reversals analysis

Derivatives Components

Derivatives components are useful tools for derivatives traders to analyze derivatives for underlying securities. Common derivatives components are:

- Option / Warrant Sorter
- Option / Price Converter
- Option Black Scholes Model
- Option Strategies
- CFD vs Equity Calculator

Sharechart

3.2 TOOLS AND DISPLAY

The ShareChart tool bars are mostly located between the menu and charts, and around the charts.

There are seven tool bars in ShareChart's main window:

- **Toolbar** - is to open charts, change the chart types/categories, & select indicators
- **Stock Selection Bar** - allows you select stock code in the most convenient way
- **Stock Group Bar** - is to group stocks for different group types
- **Palette Bar** - is for drawing lines and text on the chart
- **Format Bar** - is for drawing attributes for drawing objects and text, e.g. line width, color, and fonts, etc.
- **Stock Ticker Bar** - shows the latest stock prices in a rolling manner
- **Status Bar** - is to display the data associated with the current cursor position
- **Customizable toolbar** - allow you to customize buttons on the Customizable Toolbar of your own choice. Please see Section 2.7 Working with Customizable Bar for how to setup the Customizable Toolbar.



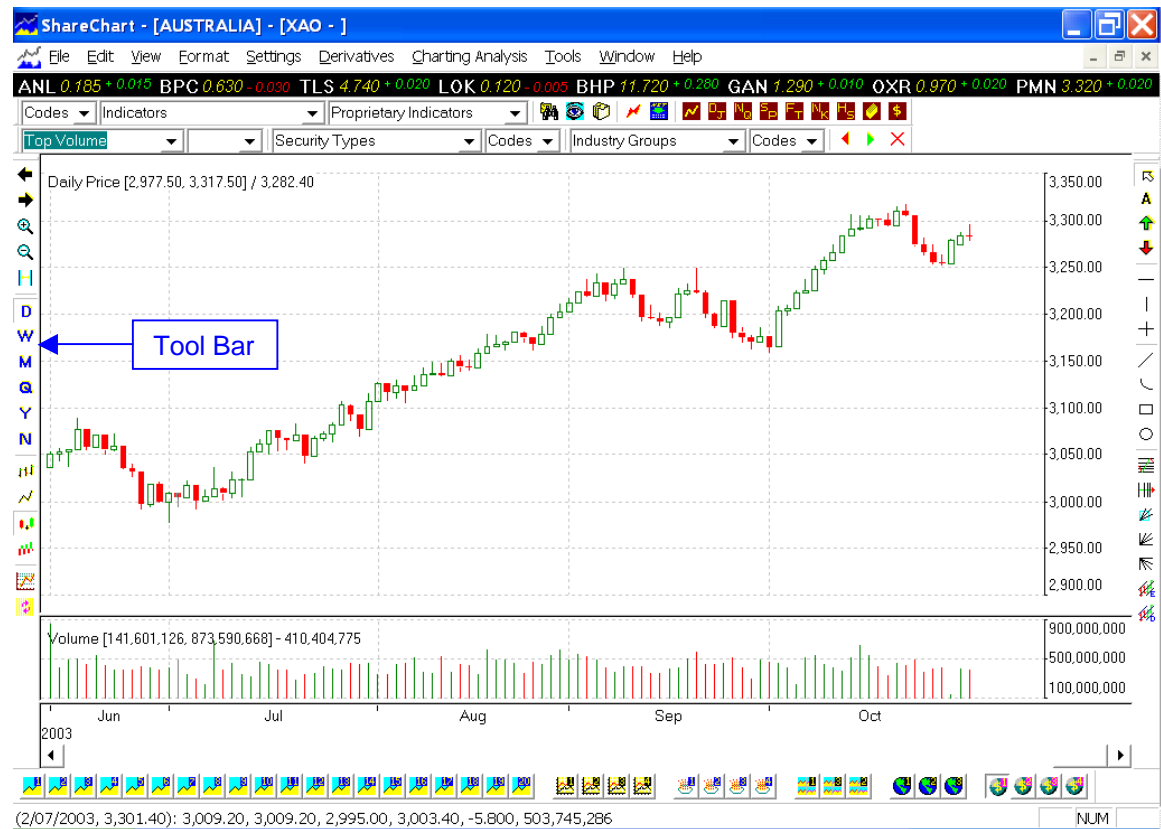
The on/off status of these tool bars can be controlled by selecting View menu and selecting responding menu item. The on/off status of toolbars will be saved when you exit ShareChart. When you open ShareChart, the on/off status will be restored.

You can arrange the position of two of the tool bars: Stock Selection Bar and Stock Group Bar by dragging and dropping them to any edge of the window.

3.3 TOOL BAR

The Toolbar is located at the left side of the chart window. You can perform tasks by simply clicking the corresponding buttons on the Toolbar.

Alternatively, you can perform some of the equivalent tasks from the Chart Options dialog box, which can be invoked from Options < Chart Options.



3.3.1 Browsing Open Stocks

You can also move to the next open stock or previous open stock by clicking on:

- Next
- Previous


Alternatively, you can select View < Next Stock or View < Previous Stock.

3.3.2 Zoom Features

To zoom in on a chart, click the zoom in button on the Toolbar.

To zoom out from the chart, click the zoom out button on the Toolbar.








Alternatively, you can select Zoom in or Zoom out from the View menu.

 Zoom to Range allows you to zoom to the specified range. Select the Zoom to Range button, or select View < Zoom to Range.

The cursor will be attached to a vertical line. Move to the first position of the range and press the left mouse button. Move to the second position of the range and release the left mouse button. The selected range will then be expanded to the whole view window. In some cases, you may not see the expected zooming effect if the zoom limit is reached.

3.3.3 Chart Types

You can change the chart types from:

- Bar chart 
- Line chart 
- Candle Stick chart 
- Tower chart 
- Swing chart 
- Heikin Ashi candlestick chart 
- Logarithmic scale chart 

You can toggle chart types by pressing F7 function key.

3.3.4 Chart Category

You can also change the chart category from:

- Daily chart 
- Weekly chart 
- Monthly chart 
- Quarterly chart 
- Yearly chart 
- N-day chart  for the number of days defined in the Chart Options

You can toggle chart categories by pressing F8 function key.

3.4 STOCK SELECTION BAR

The Stock Selection Bar is located at the top of your ShareChart program and offers a quick access to:

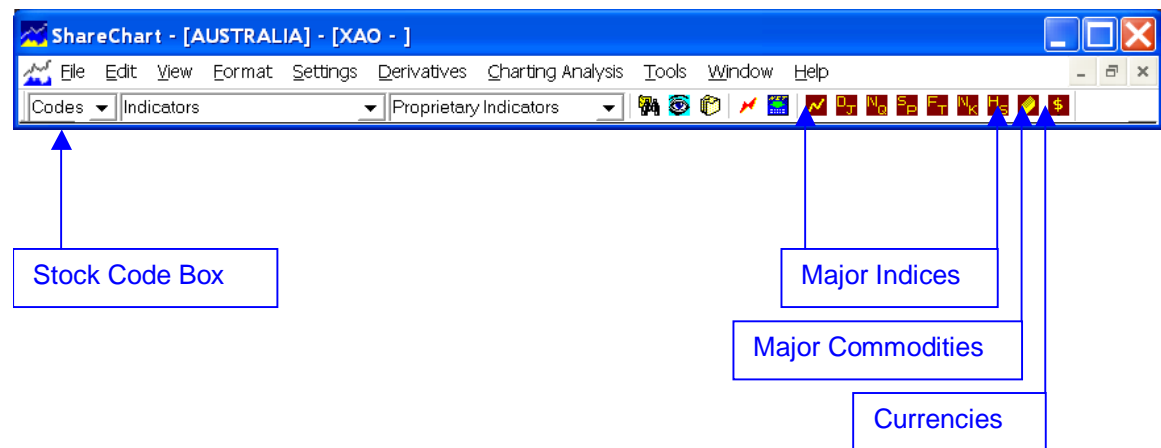
- Stock Codes
- Indicators Proprietary Indicators
- Stock Code Searches
- Watch Page Portfolio
- Page Alert System
- Data Download
- Major Indices
- Major Commodities
- Major Currencies



3.4.1 Stock Codes

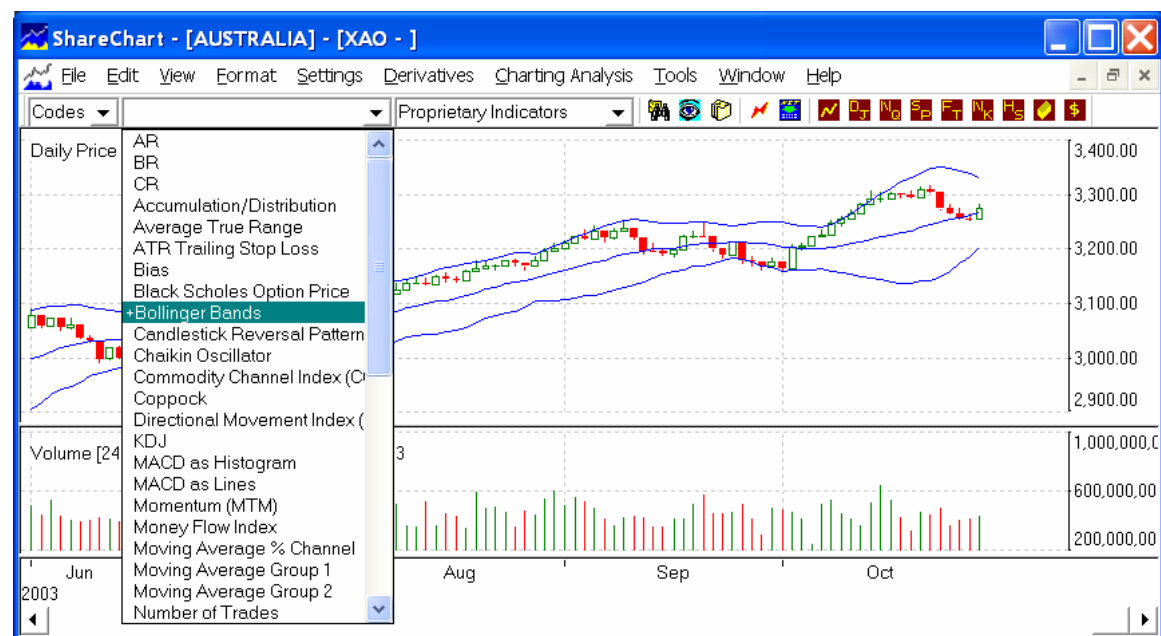
If you know the ticker code for the stock graph you would like to see, then go to the Stock Code Box and type in the code and press enter.

Selection Bar



3.4.2 Indicators/Proprietary Indicators

If you want to use an indicator to analyze a particular graph, go to either the Indicator or Proprietary Indicator dropdown box and select the appropriate one. ShareChart has over 60 popular indicators to choose from.




Selection Bar

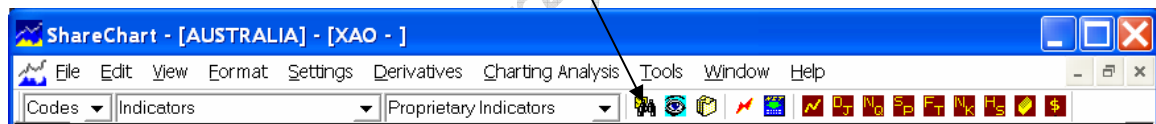


Indicators will be discussed in further detail in Chapter 6 Working with Indicators.

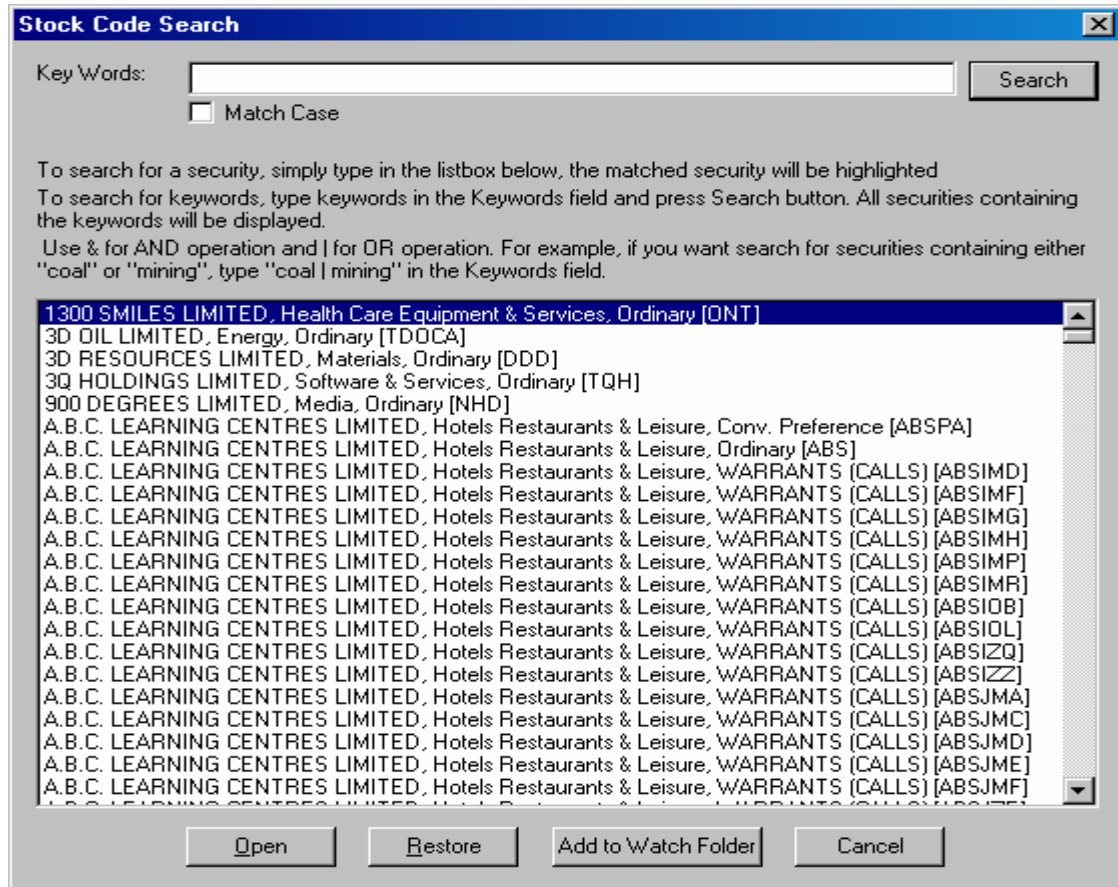
3.4.3 Stock Code Search

To use the code search,

- Select Edit < Code Search
- Or, click the Code Search button 



The following Code Search dialog box will appear:



You can type any keywords in the Key Words box and click on the Search button. All stocks that contain the keywords will be displayed in the list box.

Alternatively, you can go directly to the list box and type in the security name. While you type, the cursor will highlight the security that matches the typed text.

Once you have found the code, you can click "Open" button or simply double click the highlighted security to view its chart.

When one of the editable watch folders is selected, e.g. My Favorite, you can click Add to Watch Folder button to add the search result to the currently selected watch folder.

You can always restore the full list to perform another search.

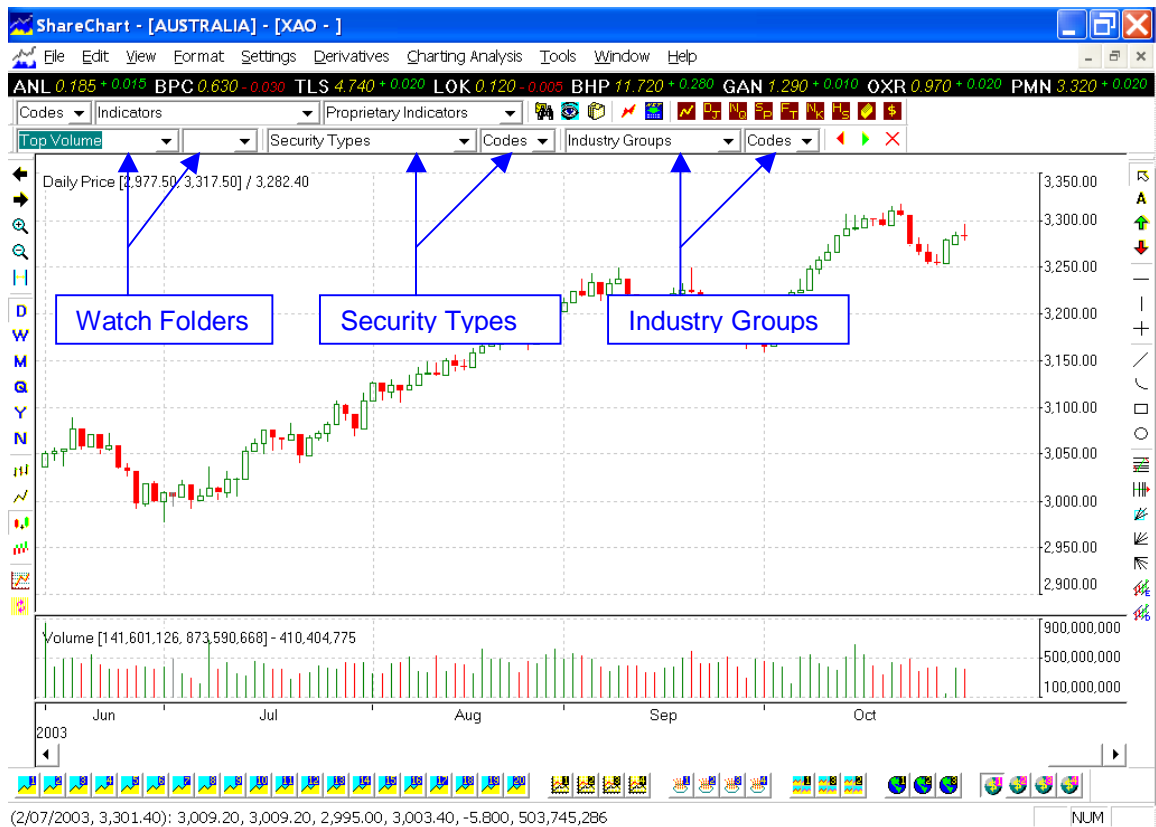
3.4.4 Watch Page and Portfolio

You can access the watch page and portfolio from the stock selection bar. This will allow you to monitor your interested stocks or stocks under your holding. For more information on watch page and portfolio management, please refer to Chapter 8 Watch Page and Portfolio.

3.5 STOCK GROUP BAR

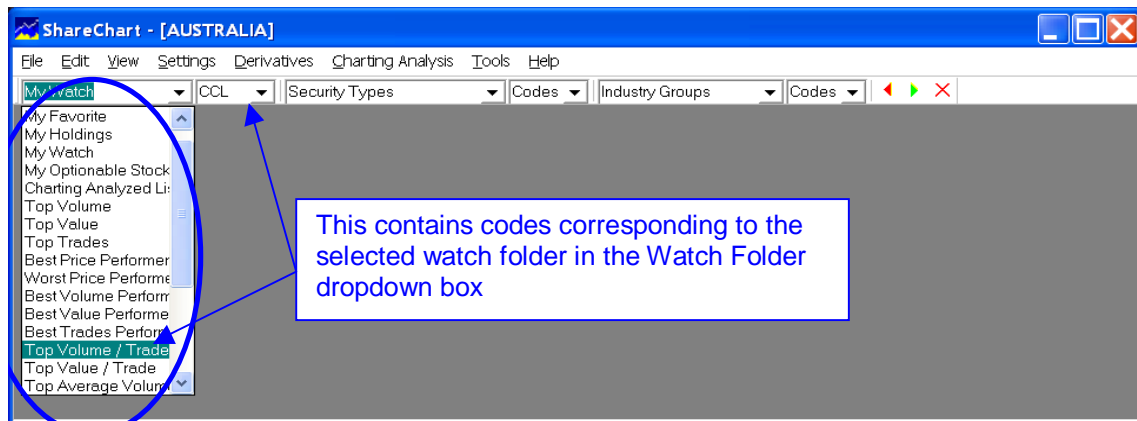
The Stock Group Bar is used to group stocks. For example, you may want to sort 100 top volume stocks or group your favorite stocks. Three group dropdown group boxes are present on the Stock Group Bar and are mutually exclusive:

1. Watch folders
2. Security Types
3. Industry Groups



The exclusivity means that if you select an item from a group box, the selected item in the other two group boxes will be deselected and the corresponding code dropdown boxes will be cleared. For example, if you select Ordinaries from the Security Types dropdown box, its corresponding stock code dropdown box will be filled with all ordinary stocks. The selected item in Watch Folders or Industry Groups dropdown box will be deselected and their corresponding code dropdown boxes will be cleared.

Whenever you change a watch Folder, security type, or industry group, not only will the content of the corresponding code dropdown box be changed, but the stocks in the Stock Ticker Bar will also be changed to reflect the changes in the corresponding code dropdown box.



You can browse stocks in a selected watch folder, security type, or industry group by clicking on Open Previous (◀) button or Open Next (▶) button. You can also use short cut keys Ctrl + Up and Ctrl + Down to browse the stocks.

You can auto open stocks in selected Watch Folders, security type, or industry group at a specified time interval by clicking on Auto Open (⏸) button or select menu File > Open Stock > Auto Open Stocks in Folder. The Auto Open (⏸) button is just next to the Open Previous (◀) and Open Next (▶) buttons.

To use this feature, you should first set a time interval to display between stocks. The time interval can be entered in seconds General Settings dialog box. The default from ShareChart is two seconds. Stocks will then be opened according to the entered time interval.

You can stop the Auto Open feature at anytime by clicking on Auto Open button or select menu File > Open Stock > Auto Open Stocks in Folder. To activate, simply click on the button again, the stock rotation will resume from where you stopped.

3.5.1 Watch Folders

There are currently seven editable watch folders:

- My Favorite
- My Holding
- My Watch
- My Optionable Stocks
- My Covered Call Stocks
- My CFD Stocks
- Real-time List

And eleven sorted/analyzed stock folders

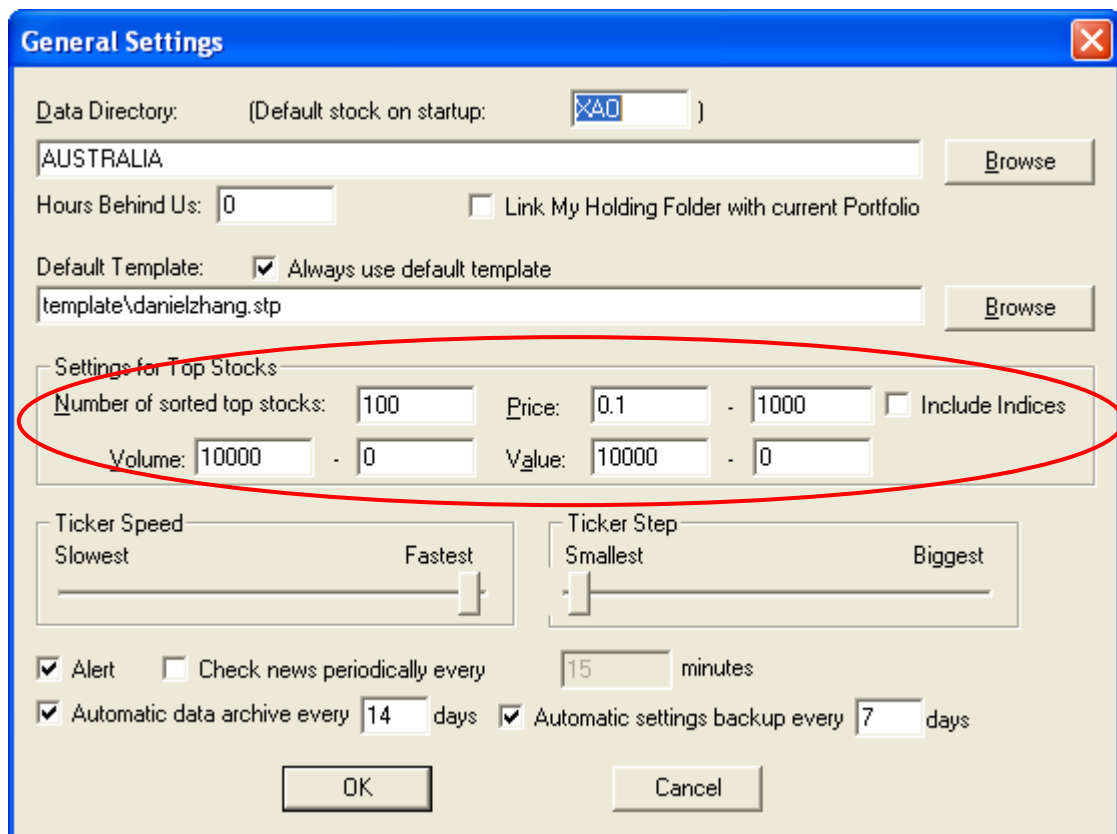
- Charting Analysis List
- Top Volume
- Top Value
- Top Volume / Trade
- Top Value / Trade
- Top Average Volume / Trade
- Top Average Value / Trade
- Best Price Performer (%)
- Worst Price Performer (%)
- Best Volume Performer (%)
- Best Value Performer (%)

In addition, there are six fundamental watch folders:

- Ascending market capitalization
- Descending market capitalization
- PE ratio
- Earning yield
- Dividend yield
- Ex dividend date.

My Favorite, My Holding, My Watch, My Optionable Stocks, my Covered Call Stocks, my CFD stocks, and Real-time List are editable using the Stock Folder editor, which can be accessed from Edit < Edit. Sorted/analyzed stock folders and fundamental watch folders are non-editable as the stocks in each folder are the result of calculation and/or analysis. They are referred as non-editable watch folders.

The number of stocks to be displayed in each non-editable folder depends on the number of tops defined in the General Settings dialog box, where you can also define what type of stocks to be displayed, i.e. setting the volume, as shown in the following figure.

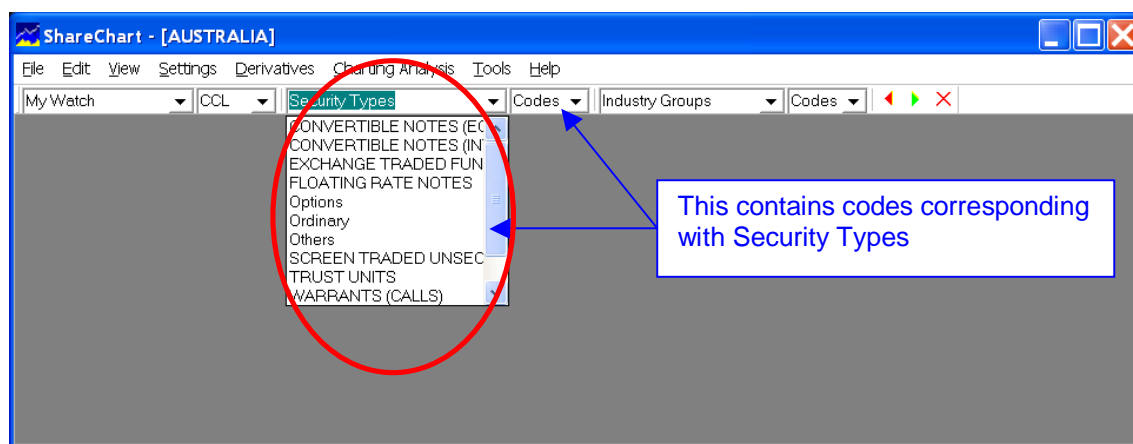


You can edit the editable watch folders. For details about how to edit the editable watch folders, please refer to Section 9.5 Editing Editable Watch Folders.

3.5.2 Security Types

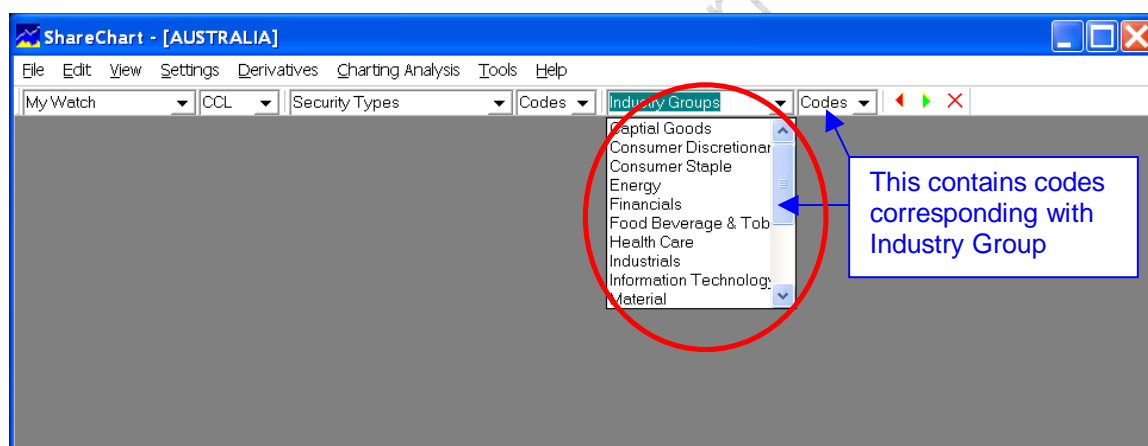
The third dropdown box on the Group Bar is the Security Types box. For Australia market, it comprises of twelve security types. The codes dropdown box next to it will display codes corresponding to the selected security type. For example, if security type Ordinaries is selected, the next code dropdown box will display all ordinary stocks.

Group Bar



3.5.3 Industry Groups

The fifth dropdown box is the Industry Group box. For Australia market, it comprises of twelve industry groups. The codes dropdown box next to it will display codes corresponding to the selected industry group. For example, if Industry Group Material is selected, the next code dropdown box will display all material stocks.



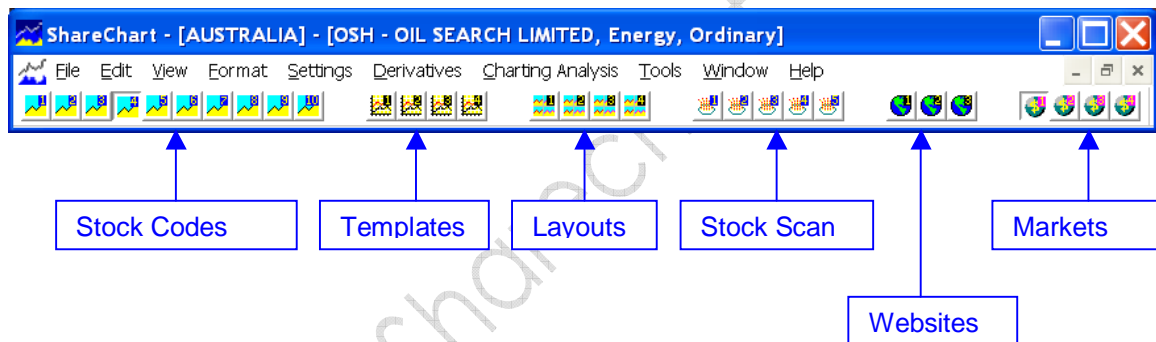
3.6 PALETTE BAR

Palette Bar is used for drawing lines and text on charts. Together with Format Bar, ShareChart provides you a rich set of drawing tools for annotating charts for technical analysis. For more information, please see Chapter 4 Working with Drawings.

3.7 CUSTOMIZABLE BAR

ShareChart provides a Customizable Bar that will provide short cuts to your frequently performed tasks, and thus make it easy in using ShareChart. It is located at the bottom of your program screen. There are eight button types:

- Stock Codes
- Templates
- Layouts
- Stock Scans
- Internet Web Sites
- Markets
- Commands
- Settings



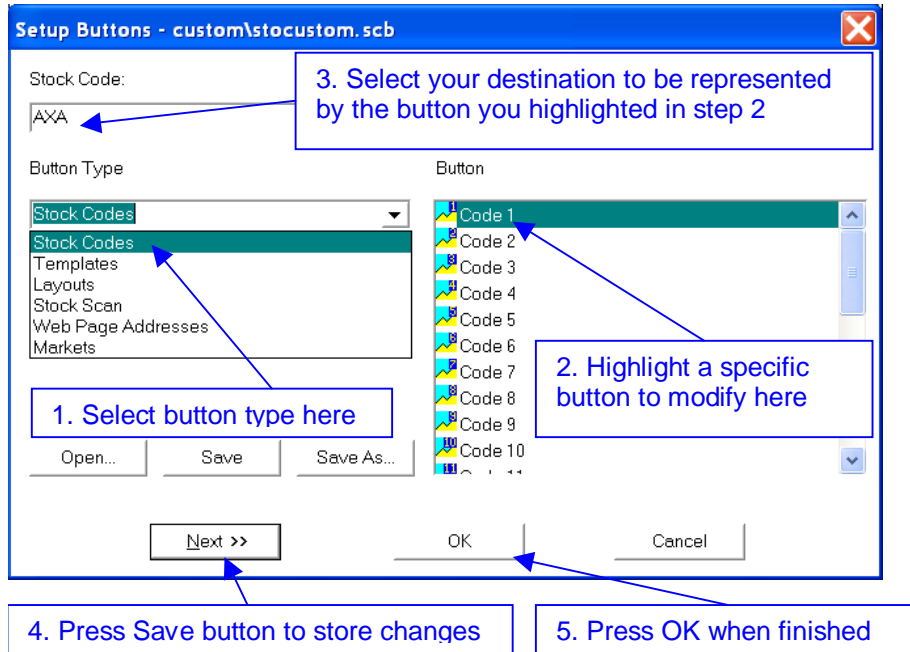
You can assign up to 30 buttons stock codes and up to 20 buttons for each of the other button types: templates, layouts, stock scans, Internet web pages, markets, commands, and settings.

When you move the cursor over a button, the tool tip will show the current content assigned to the button and the status bar shows the button name.

Once you have setup the buttons for the Customizable Bar, you can add and delete the buttons to and from the Customizable Bar.

To assign the buttons to the Customizable Bar, select Tools < Setup Customizable Bar, the following button setup dialog box will appear.

Customisable Bar



Selecting a button type will show the corresponding buttons in the Button box.

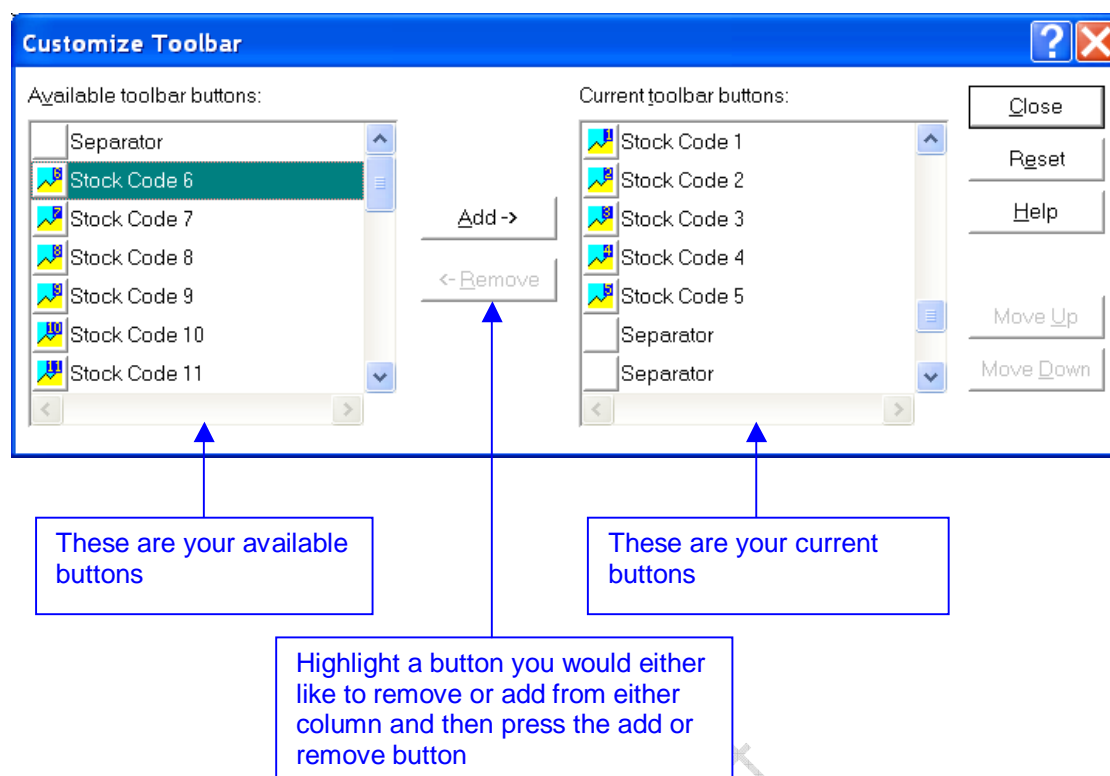
1. Select a button in the Button box, and modify the contents in the edit field. For example, when you select button type "Stock Code" in the Button Type dropdown box, 30 stock code buttons appear in the Button box and the title for the edit field is changed to "Stock Code".
2. Enter the stock code and select another code button. For Market buttons, you will need to enter the Market name. For example, to assign the USA market to the market button, type "USA".

You can save the current setting by clicking on the Save button, or save to another file by clicking on the Save As button.

You can also open an existing setting by clicking on the Open button. When you have finished, you can simply click the OK button. This will save the current setting to the file displayed on the title of the dialog box, and exit the dialog box. If you click the Cancel button, you will lose any changes that you have made.

If you want to add/remove buttons, press the **"Next"** button. The following dialog box will appear.

Customisable Bar



Select the button that you want to add to or remove from the Customizable Bar and click the Close button when you have finished.

For IT professionals, there also has quick button of "Command Button". You can assign a command button with a system or batch command and run the command or batch from ShareChart by pressing a command button.

TIP: While buttons appear on the Customizable Bar, you can simply move a button by dragging the button on the Customizable Bar and holding the Shift key. To remove a button, simply drag it away from the Customizable Bar while holding the Shift key.

The Customizable Bar is turned on by default. To turn the Customizable Bar on/off, select View < Customizable Bar menu item.

3.8 PRINTING/COPYING A CHART

To print the current chart, select File < Print. In the print dialog box, select the printer that is attached to your computer and press the OK button.

You can also perform a print preview before printing by selecting File < Print Preview. In the Print Preview window, you can zoom in and out the previewed chart by selecting Zoom In or Zoom Out button. Once you are satisfied with the print preview, click Print button in the Print Preview window to print the chart.

ShareChart also provides a standard print setup feature where you can setup your printer, page size and page orientation. The feature can be accessed from File < Print Setup.


You can copy and paste the chart in the current window into your favorite applications (e.g. Microsoft Word) for your documentation or presentation. To copy, simply right click on the chart and select Copy from the popup menu. Open your favorite application, right click and select Paste from the Edit menu. You can specify the size of chart image by selecting Settings < Chart Settings, and select Margin page. In the "Size of copying chart" field, fill in the size in pixels (points).

You can also save the current chart to a bitmap file so that you can share the chart as a bitmap image with others. To save the current chart to a bitmap file, select File < Save as Bitmap.

Sharechart

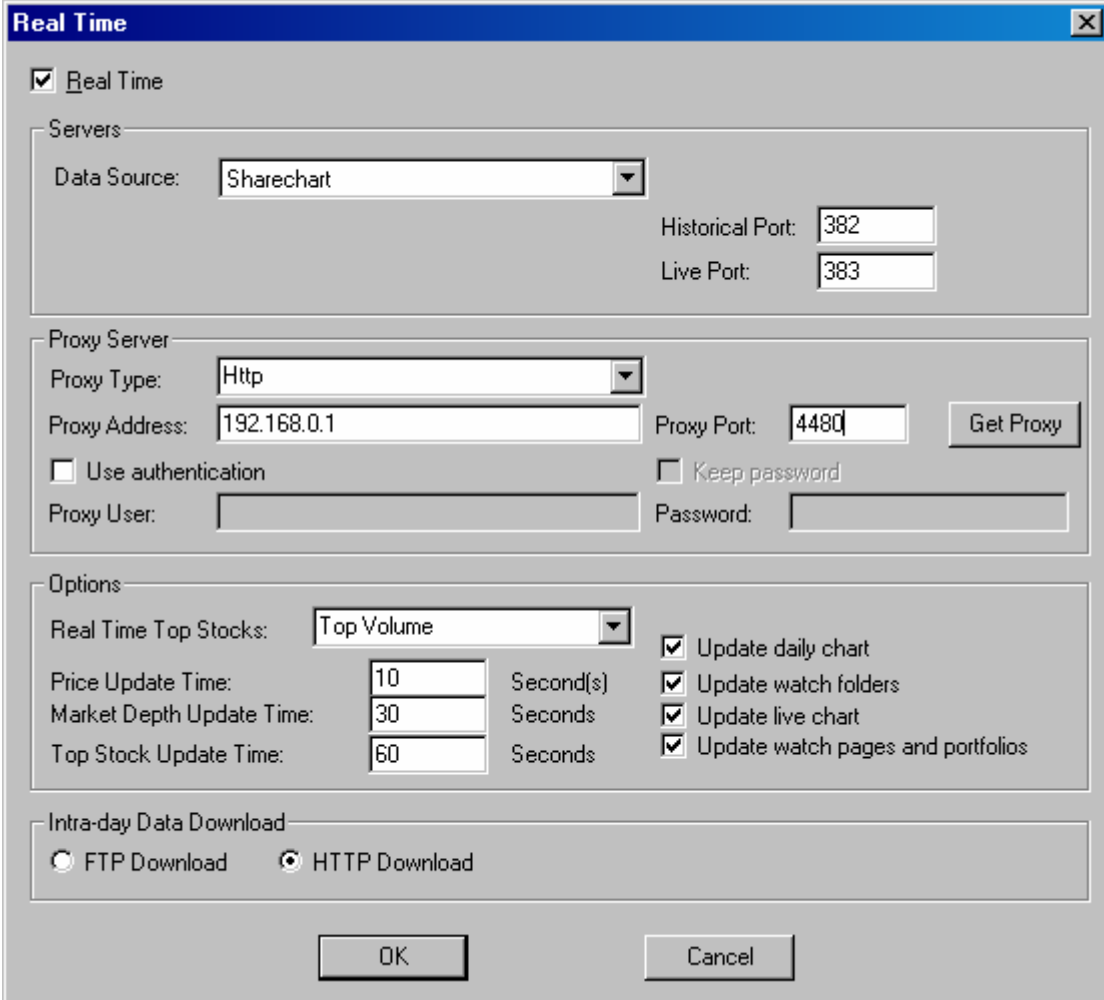
3.9 REALTIME CHARTS

When ShareChart is open, realtime mode is off. You can operate ShareChart without connecting to the Internet. To activate the realtime, your computer must connect to the Internet.

To activate realtime, simply click on the Realtime button  on the Toolbar on the left. Once the realtime is activated, the Realtime button is pushed down, indicating that ShareChart is in realtime mode and is ready for you to view realtime charts.

In most cases, ShareChart will detect a proxy server if your computer is connected to the Internet through a proxy server. If you want to select a different proxy server or configure realtime parameters, you can select Settings > Real Time.

In the realtime dialog box, all fields are disabled if ShareChart is not in realtime mode. You can tick "Real Time" check box to enable the relevant fields, as follows.



The Real Time dialog box is a standard Windows-style window with a title bar and a close button. It contains several sections for configuring realtime data:

- Real Time:** A checked checkbox at the top left.
- Servers:** A section containing a 'Data Source' dropdown menu set to 'Sharechart', a 'Historical Port' text box with '382', and a 'Live Port' text box with '383'.
- Proxy Server:** A section containing a 'Proxy Type' dropdown menu set to 'Http', a 'Proxy Address' text box with '192.168.0.1', a 'Proxy Port' text box with '4480', and a 'Get Proxy' button. Below these are checkboxes for 'Use authentication' (unchecked) and 'Keep password' (unchecked), followed by 'Proxy User' and 'Password' text boxes.
- Options:** A section containing a 'Real Time Top Stocks' dropdown menu set to 'Top Volume', three update time settings (Price Update Time: 10, Market Depth Update Time: 30, Top Stock Update Time: 60, all in seconds), and four checked checkboxes: 'Update daily chart', 'Update watch folders', 'Update live chart', and 'Update watch pages and portfolios'.
- Intra-day Data Download:** A section at the bottom with two radio buttons: 'FTP Download' (unchecked) and 'HTTP Download' (checked).

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

The realtime dialog box is composed of four groups: Servers, Proxy Servers, Options, and Data Transfer Protocol.

Parameters in Servers group are predefined. You are not required to change them unless it is absolutely necessary. Otherwise, the connection with the Sharechart data servers may not work.

To set a proxy server, select a proxy type from the "Proxy Type" dropdown box, type in the proxy server address and proxy port number. You can click "Get Proxy" button to let ShareChart detect a proxy server for you.

Parameters in Options group are straightforward. You may change them according to your needs. You can revisit them at anytime even when ShareChart is realtime mode.

In Data Transfer Protocol group, you can select either FTP or HTTP transfer protocol for updating data for whole market and top stocks at the time intervals specified in the Options group.

When ShareChart is in realtime mode, you can open a realtime chart in two ways.

Way 1 – Open a daily chart and then click "Realtime Chart" button .

Way 2 – Assign stocks to the realtime watch folder same as you assign stocks to other watch folders (e.g. My Favorite). Then open the realtime charts from the realtime watch folder.

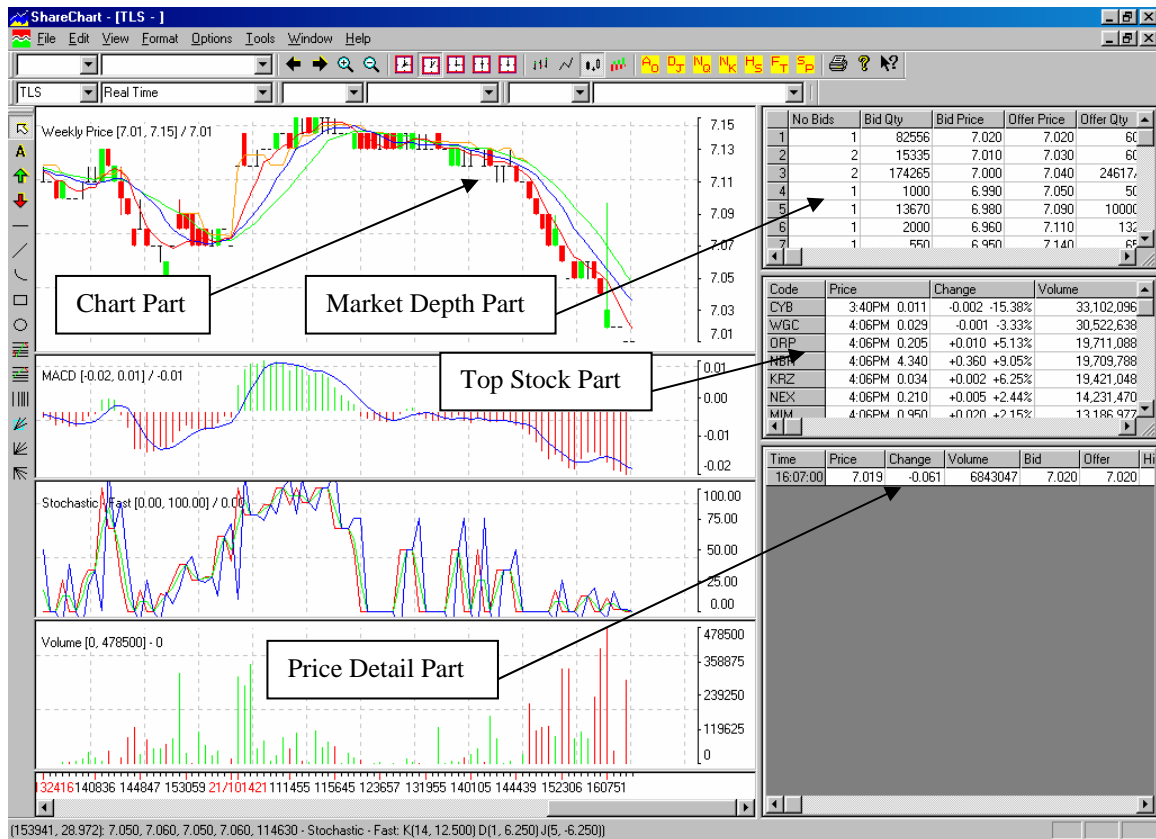
When a realtime chart is open, the "Realtime Chart" button is pushed down, indicating that ShareChart is now in realtime charts mode. When in realtime chart mode, you open subsequent realtime charts by simply typing stock codes or selecting stock codes from the code dropdown box.







To switch to its daily chart for the realtime chart under viewing, simply click the "Realtime Chart" button again. Then you can then view daily chart by simply typing stock codes or selecting stock codes from the code dropdown box. Switching to daily chart mode does not close the open realtime charts. Therefore, all open realtime charts are still updating, when you view daily charts.

To stop data updating for a realtime chart, you can close the realtime chart. To stop data updating for all realtime charts, turn the realtime mode off by clicking on the pushed down Realtime button. This will close the connection with server as well.

A realtime chart in ShareChart consists of four parts: chart part, top stock part, market depth part, and trade list part, as shown in the following figure.

Realtime Charts



The operation of the chart part is exactly identical to the operation for daily charts, where you can switch between seconds chart , 5 minutes chart , 15 minutes chart , ½ hour chart , and 1 hour chart , and any minute chart  by clicking the corresponding clock buttons on the Toolbar. You can apply all indicators, drawing, and alerts on the chart just as you are working with daily chart.

When a realtime chart is open, ShareChart will retrieve its historical intra-day data for the stock for up to two weeks and display in the chart window. The first line of the Trade List window will be updated with the latest price information. Subsequent trades will then be added to the Trade List window. Market Depth and Top Stock windows will update accordingly.

Whenever there is a trade for the stock under viewing, the realtime chart will update according to the trade time in relation to the chart timeframe. If the realtime chart is five minutes, for example, the price bar will get updated if the trade occurs within the five minutes and a new bar will be created otherwise. The trade will be added to trade list window with the current bid and ask information.

The market depth part will refresh whenever there is a trade, or time elapses more than a minute if there is no trade within a minute. To reduce the traffic volume, ShareChart does not update market depth based on any order added, modified, or deleted from the market depth.

The top stock part will show top ten stocks by top type: volume, price gains, or price losers. The selection of the top type is in the Real Time Setting dialog box. The updating time interval for Top stocks depends on the time that you entered in "Top Stock Update Time" field. The default is 60 seconds.

Realtime Charts

When the realtime chart is updated for a trade, you can decide whether you want to update daily chart, watch pages, or portfolio by ticking the appropriate boxes in the Realtime dialog box.

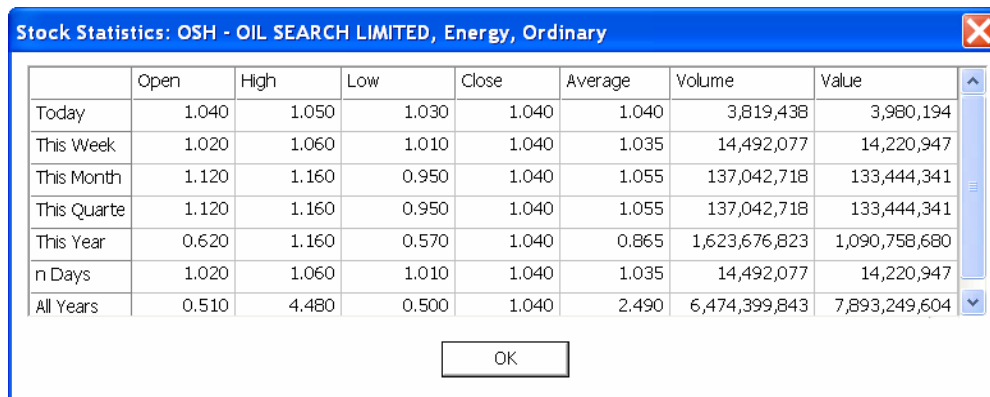
TIP: If you encounter the error message "Out of memory", it is possible that you open too many realtime charts. Remember that some realtime charts consume quite considerable memory if the stock is very active. If it is the case, you may restrict yourself from opening many realtime charts.

Sharechart

CHAPTER 4 WORKING WITH STOCK DATA

4.1 STOCK HISTORICAL DATA AND STOCK STATISTICS

You can view the historical stock data by right clicking on a chart and selecting Stock Data from the popup menu. Alternatively, you can select Stock Data item from the View menu. You can also view the stock statistics (weekly average, monthly average, etc) by right clicking and selecting Stock Statistics from the popup menu. Alternatively, you can also select it from the View menu.

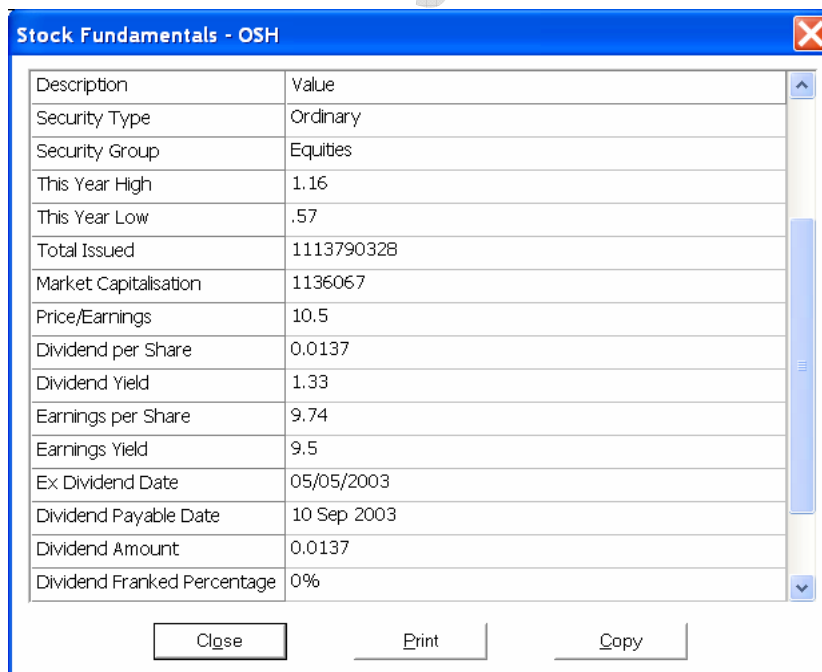


	Open	High	Low	Close	Average	Volume	Value
Today	1.040	1.050	1.030	1.040	1.040	3,819,438	3,980,194
This Week	1.020	1.060	1.010	1.040	1.035	14,492,077	14,220,947
This Month	1.120	1.160	0.950	1.040	1.055	137,042,718	133,444,341
This Quarter	1.120	1.160	0.950	1.040	1.055	137,042,718	133,444,341
This Year	0.620	1.160	0.570	1.040	0.865	1,623,676,823	1,090,758,680
n Days	1.020	1.060	1.010	1.040	1.035	14,492,077	14,220,947
All Years	0.510	4.480	0.500	1.040	2.490	6,474,399,843	7,893,249,604

OK

4.2 STOCK FUNDAMENTALS

ShareChart provides a Stock Fundamentals menu item, which can be accessed from both View and the right-click popup menu when looking at a graph. Stock Fundamental provides useful information about a stock's fundamental details: market capitalization, P/E ratio, earnings per share, etc. This data will usually be updated on a weekly basis.



Description	Value
Security Type	Ordinary
Security Group	Equities
This Year High	1.16
This Year Low	.57
Total Issued	1113790328
Market Capitalisation	1136067
Price/Earnings	10.5
Dividend per Share	0.0137
Dividend Yield	1.33
Earnings per Share	9.74
Earnings Yield	9.5
Ex Dividend Date	05/05/2003
Dividend Payable Date	10 Sep 2003
Dividend Amount	0.0137
Dividend Franked Percentage	0%

Close Print Copy

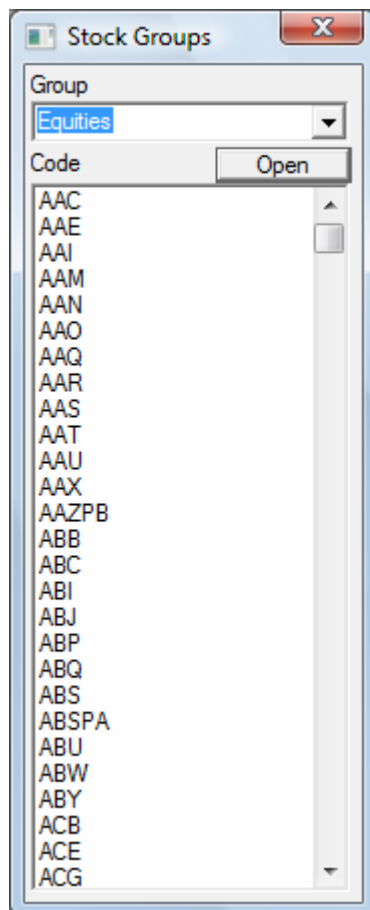
4.3 STOCK INFO PANE

Stock Info Pane is a useful window for viewing stocks in a numerical form at the current cursor position. In addition to the open, high, low, close and volume values, it also dynamically shows the values for the currently open indicators at the current cursor position with the same colors as the indicator lines. It can be easily toggled on/off by selecting the Stock Info Pane from the right-click Popup menu when looking at a graph or from View menu.



4.4 STOCK GROUP

Stock Group window will allow you to view stock codes grouped by stock group. For example, you may want to view all codes in equity group. To open the Stock Group window, select Stock Group from the Edit menu and the following Stock Group window appears.

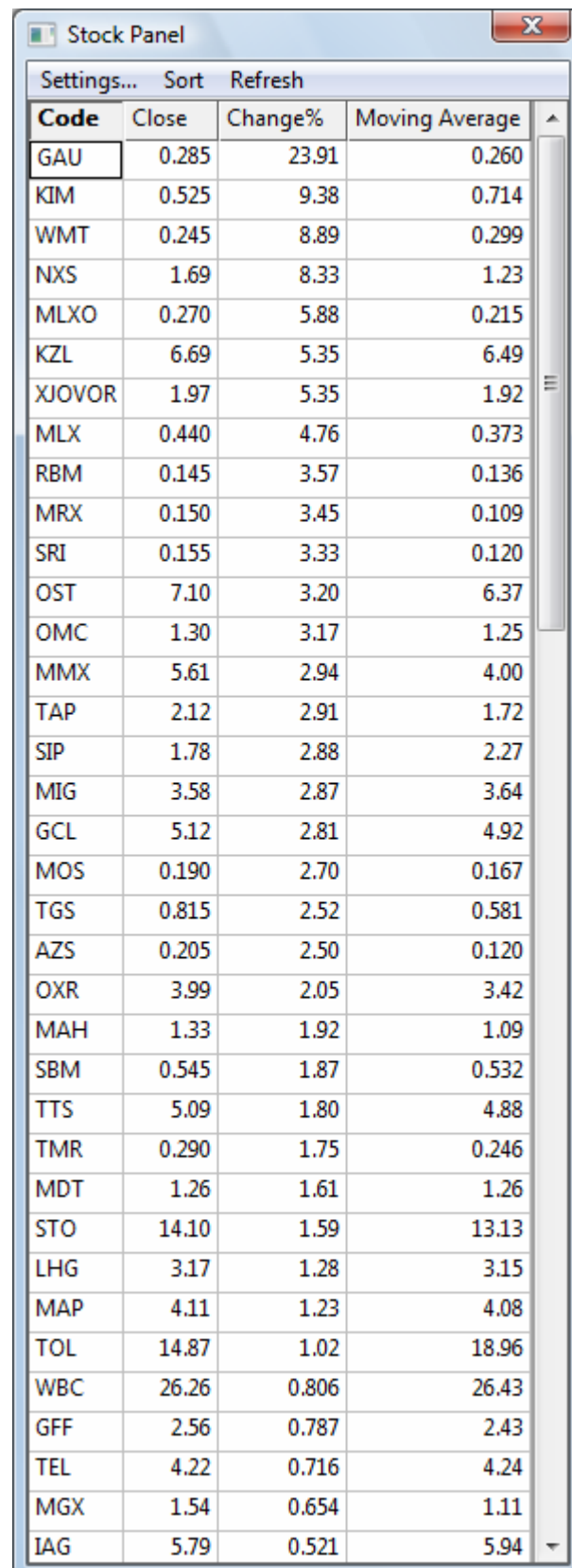


From the above window, all codes will be displayed when a stock group is selected from the Group dropdown box. You can open a chart by double clicking on anyone in the Code list box, or selecting a code first then clicking on Open button.

4.5 STOCK PANEL

Stock Panel is used to group stocks according to the selection of watch folders, security types, or industry groups. It is different from their associated code dropdown box in that indicator information is displayed along with the stock codes. This will allow you to gain richer information at glance and perform sorting on the displayed data. To open stock panel, select Stock Panel from Edit menu. The following window will appear.

Stock Info



Code	Close	Change%	Moving Average
GAU	0.285	23.91	0.260
KIM	0.525	9.38	0.714
WMT	0.245	8.89	0.299
NXS	1.69	8.33	1.23
MLXO	0.270	5.88	0.215
KZL	6.69	5.35	6.49
XJOVOR	1.97	5.35	1.92
MLX	0.440	4.76	0.373
RBM	0.145	3.57	0.136
MRX	0.150	3.45	0.109
SRI	0.155	3.33	0.120
OST	7.10	3.20	6.37
OMC	1.30	3.17	1.25
MMX	5.61	2.94	4.00
TAP	2.12	2.91	1.72
SIP	1.78	2.88	2.27
MIG	3.58	2.87	3.64
GCL	5.12	2.81	4.92
MOS	0.190	2.70	0.167
TGS	0.815	2.52	0.581
AZS	0.205	2.50	0.120
OXR	3.99	2.05	3.42
MAH	1.33	1.92	1.09
SBM	0.545	1.87	0.532
TTS	5.09	1.80	4.88
TMR	0.290	1.75	0.246
MDT	1.26	1.61	1.26
STO	14.10	1.59	13.13
LHG	3.17	1.28	3.15
MAP	4.11	1.23	4.08
TOL	14.87	1.02	18.96
WBC	26.26	0.806	26.43
GFF	2.56	0.787	2.43
TEL	4.22	0.716	4.24
MGX	1.54	0.654	1.11
IAG	5.79	0.521	5.94

For the first it is displayed, it shows a blank window. When you select an item from Watch Folders, Security Types, or Industry Groups dropdown box, all codes associated with the selected item will be displayed in the Stock Panel. Since the display involves considerable calculation on the selected indicators, you may wait a few minutes if the number of codes is very large. For example, if you select Ordinary from Security Types

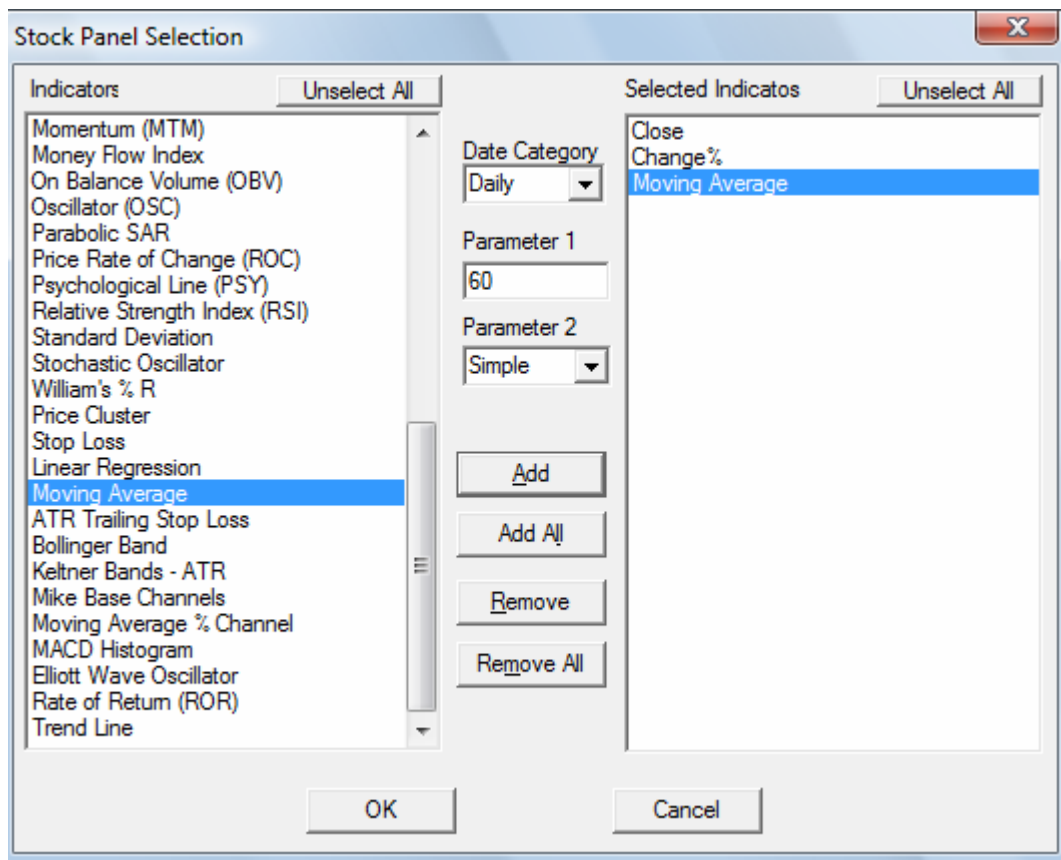
Stock Info

Working with Stock Data

dropdown box, you may wait two minutes before all codes with associated indicators are displayed. With no-editable items in the Watch Folders, you can limit the number of codes by selecting Settings > General Settings and entering a number in the "Number of sorted stocks" field.

You can sort an indicator by selecting its corresponding column and selecting either Sort Ascending or Sort Descending from the Sort menu. Selecting Refresh menu will recalculate the indicators for each code in the Stock Panel. It may take a few minutes if the number of codes in the Stock Panel is very large.

You can change the indicators for display by selecting "Settings...". The following Stock Panel Selection dialog box appears.



In the above dialog box, you can select an indicator in the Indicators listbox and click Add button to add it to the Selected Indicators listbox. Conversely, you can select an indicator in the Selected Indicators listbox and click Remove button to remove it from the Selected Indicators listbox. You can make multiple selections in the both listboxes and click Add or Remove button to add or remove them. Alternatively, you can select Add All or Remove All button to add or remove all indicators.

When an indicator is added to the Selected Indicators listbox, its parameters are not assigned any value. You must select it in the Selected Indicators listbox and assign its date category and parameter.

When you have finished selecting indicators, you can click OK button to close the Stock Panel Selection dialog box and return to the Stock Panel. The selected indicators will be recalculated for the codes in the Stock Panel. Again it may take a few minutes if the number of codes in the Stock Panel is very large.

4.6 STOCK SORT

With ShareChart, you can sort stocks according to their security types, industry group by top volume, price change, and etc. To open stock sort, select Stock Sort form Edit menu. The following window will appear.

Security Type:	Sorted																																	
Ordinary	<table border="1"> <thead> <tr> <th>Code</th> <th>Price</th> <th>Top Volume</th> </tr> </thead> <tr> <td>PBG</td> <td>0.340</td> <td>2,296,806.00</td> </tr> <tr> <td>DJS</td> <td>2.95</td> <td>690,318.00</td> </tr> <tr> <td>HVN</td> <td>2.44</td> <td>488,140.00</td> </tr> <tr> <td>WTF</td> <td>3.55</td> <td>176,386.00</td> </tr> <tr> <td>JBH</td> <td>9.13</td> <td>115,611.00</td> </tr> <tr> <td>CPR</td> <td>0.125</td> <td>100,000.00</td> </tr> <tr> <td>CCV</td> <td>0.275</td> <td>71,413.00</td> </tr> <tr> <td>SFH</td> <td>0.265</td> <td>52,524.00</td> </tr> <tr> <td>ARP</td> <td>2.70</td> <td>37,776.00</td> </tr> <tr> <td>TRS</td> <td>9.28</td> <td>13,435.00</td> </tr> </table>	Code	Price	Top Volume	PBG	0.340	2,296,806.00	DJS	2.95	690,318.00	HVN	2.44	488,140.00	WTF	3.55	176,386.00	JBH	9.13	115,611.00	CPR	0.125	100,000.00	CCV	0.275	71,413.00	SFH	0.265	52,524.00	ARP	2.70	37,776.00	TRS	9.28	13,435.00
Code	Price	Top Volume																																
PBG	0.340	2,296,806.00																																
DJS	2.95	690,318.00																																
HVN	2.44	488,140.00																																
WTF	3.55	176,386.00																																
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SFH	0.265	52,524.00																																
ARP	2.70	37,776.00																																
TRS	9.28	13,435.00																																
Issuer Type:																																		
Industrial																																		
Industry Group:																																		
Consumer Discretionary																																		
Industry Sub Group:																																		
Retailing																																		
Sort By:																																		
Top Volume																																		
Date Category:																																		
Daily																																		
Sorted top stocks:	100																																	
Volume:	10000 - 0																																	
Price:	0.1 - 1000																																	
Value:	10000 - 0																																	

For the first it is displayed, it shows a blank window. From the above dialog box, you can set the security types, issuer types, industry groups and subgroups. With Sort By dropdown box, you can decide whether stocks are sorted by volume, value, or price change. With Date Category dropdown box, you can choose to sort stocks on daily, weekly, or monthly basis.

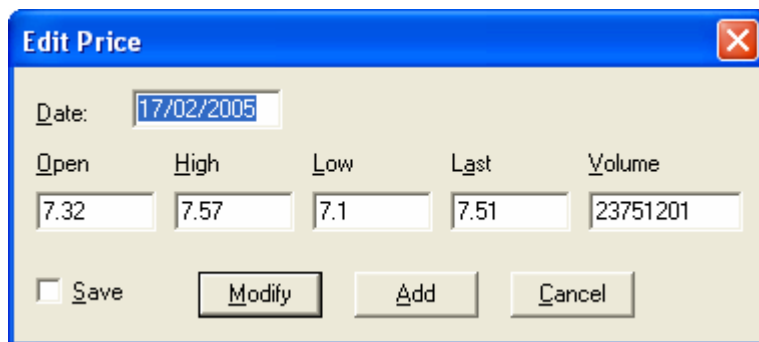
You can restrict the stocks to be sorted by setting the number of top stocks to be displayed, volume rang, price range, and value range. If the upper limit is set zero, it indicates unlimited upper limit. For example, if you set 10000 – 0 in the volume range, it indicates that you want to sort stocks with volume more than 10000.

After you have made selections, and click Sort button, ShareChart will sort accordingly all stocks that meet the selection criteria and display the sorted stocks in the Sorted Stocks window with appropriate information. If you double click a stock (or select the stock then click Open Chart button), the chart for the stock will be displayed.

You can save the sorted stocks to a watch folder by clicking Save to Watch Folder button. For the saved watch folder file, you can open it using Watch Folder editor. For details about opening a watch folder, please refer to Section 9.5 Editing Editable Watch Folders.

4.7 EDIT PRICE

Edit Price allows you to change stock data for a specific date. You can simply right click on a date to be modified, select "Edit Price". Modify the price data, and click the "Modify" button or the "Add" button (if you add a new date to the chart).



Open	High	Low	Last	Volume
7.32	7.57	7.1	7.51	23751201

If you want the modified or added data to be saved to the original data, tick the Save check box.

Sharechart

4.8 STOCK DILUTION EDITOR

Some stocks involve stock splits or capital returns that dilutes the value of the existing stocks. The reasons for stock splits are multifold depending on the needs from both issuers and shareholders. One of the common reasons is when the issuers believe that the current stock price appears to be too expensive/cheap for investors. When the stock split happens, the stock value becomes diluted and chart becomes distorted. The historical prices may not truly reflect the current prices. Therefore, adjustment is necessary.

ShareChart offers the dilution editor for the user to adjust for the stock split. You can access dilution editor by selecting Edit < Dilution Editor. The following Dilution Editor box will appear.

Code	Date	From Shares	To Shares	Action
New: CPU	19/10/1999	1	4	Add
CIN 911125 10 11	19/10/1999	1	4	Delete
CIN 921119 10 11				
CIN 931126 10 11				
CIN 941117 10 11				
CIN 970707 1 2				
CKR 010111 5 6				
CLL 870605 41 45				
CLL 930903 73 75				
CML 881124 8 9				
CML 921110 4 9				
CNP 040928 5 1				
COF 041208 1 5				
CPU 970925 1 4				
CPU 991019 1 4				
CQT 961216 61 64				

OK Save Cancel

The first row of the Dilution Editor is for adding the new dilution record. The second row is for modifying records in the dilution list box on its left. Each item in the dilution list box is represented by Stock Codes, date in yymmdd format, number of from shares, and number of to shares. For capital return, From Shares field should be filled with the return value and To Shares field should be filled with zero.

If you open the Dilution Editor without a chart open, no item in the Dilution list box is selected and the new Code field is not filled with any code. Otherwise, the new Code field will be filled with the stock code of the current open chart depending on whether the date with the code is already in the Dilution list.

If you open the Dilution Editor by selecting "Edit < Dilution Editor, the code will be defaulted to the code of the open chart. No item of the Dilution list box is selected.

If you open the Dilution Editor from the chart popup menu, the date at the cursor will be retrieved to the date edit field as well. If the date that you are editing is already in the Dilution list, the corresponding item in the Dilution list box is highlighted. The dilution data are displayed in the edit fields on the right side of the Dilution list box where you can make appropriate changes. If the date is not in the Dilution list, then the retrieved date will be displayed at the date field of the first row.

Whenever you select an item in the Dilution list box, the entries of the selected item will be displayed in the edit box on the right side where you can make appropriate changes. You can of course delete the selected item by clicking the "Delete" button. You can save your changes by selecting "Save" during the editing.

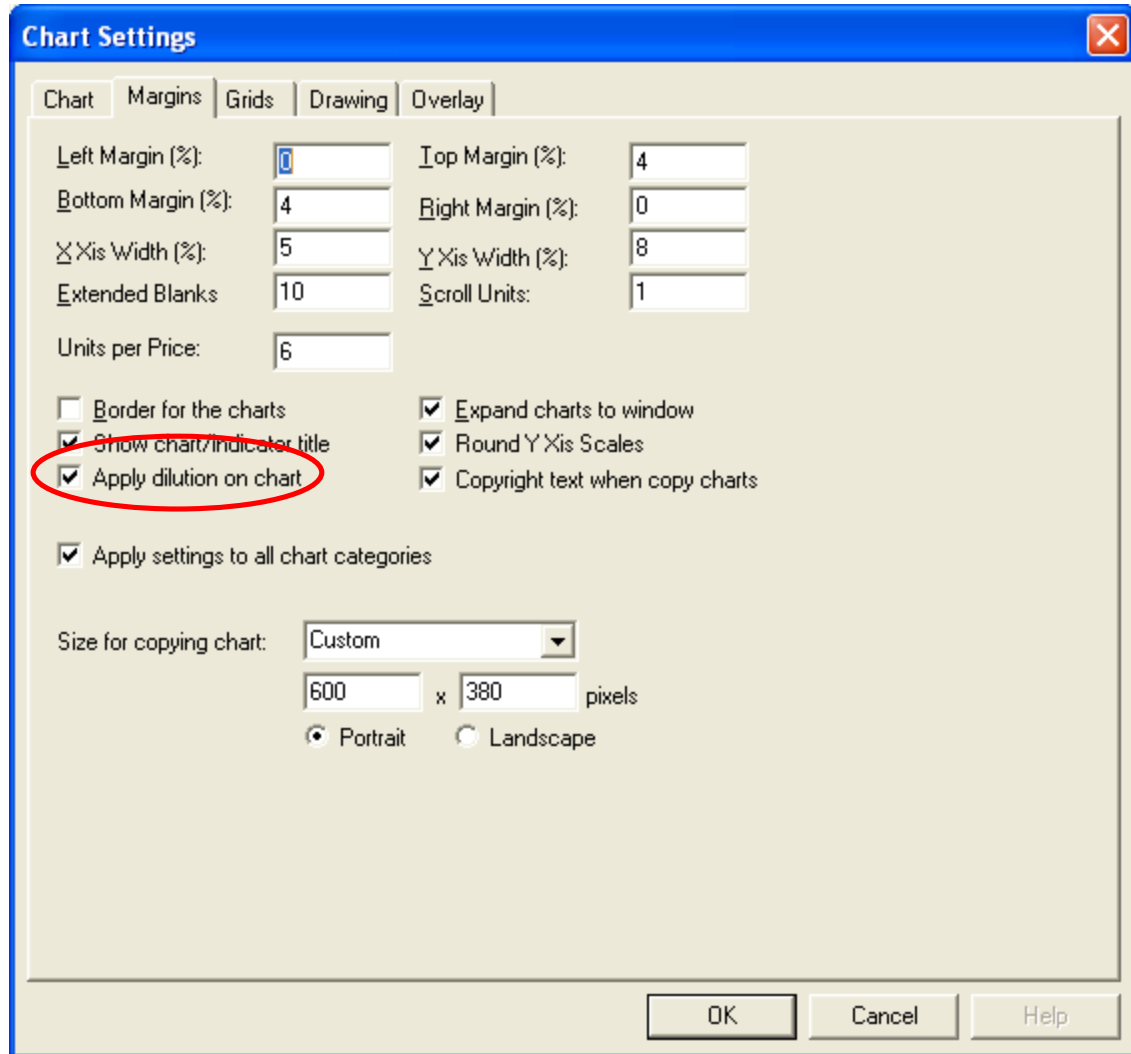
Once you click the OK button, the changes will be saved and the share prices before the dilution date on the chart will be changed to reflect the stock dilution. You will also notice that the "Apply dilution on charts" check box of the Chart Margin dialog box is also ticked to reflect the change.

TIP 1: You can perform the stock dilution by moving the cursor on a desired date on the chart and click the right mouse button. You can then choose Dilution Editor from the popup menu. In this case, the new Date field of the Dilution Editor will be defaulted with the date at the cursor. If the Stock dilution has already been set, the corresponding item in the Dilution list box will be selected.

TIP 2: Stock dilution for all stocks will be saved to the text file SplitMerge.stc. Therefore, you can manually edit the stock split by editing SplitMerge.stc using any text editor. You need only change four fields for each record: Stock Code, Date in yymmdd format, From shares, and To shares. When editing SplitMerge.stc, ensure that the header 'SPLIT/MERGE' will always be on the top line of the file.

In most cases, ShareChart will update the stock dilution information during your data download. You will need to enable dilution on a chart manually by going Settings < Chart Settings < Margins as shown below:

Dilution Editor



Sharechart cannot guarantee that dilution information for all stocks is updated. If the dilution is not shown on your chart even the "Apply dilution on charts" of the Chart Settings is enabled, it is likely that dilution information for the stock is not updated. In this case, you may want to use Dilution Editor to add dilution information.

Below is an example of a graph after a stock split:

Dilution Editor

Working with Stock Data



Below is the same stock after the stock split, however now share price is joined:

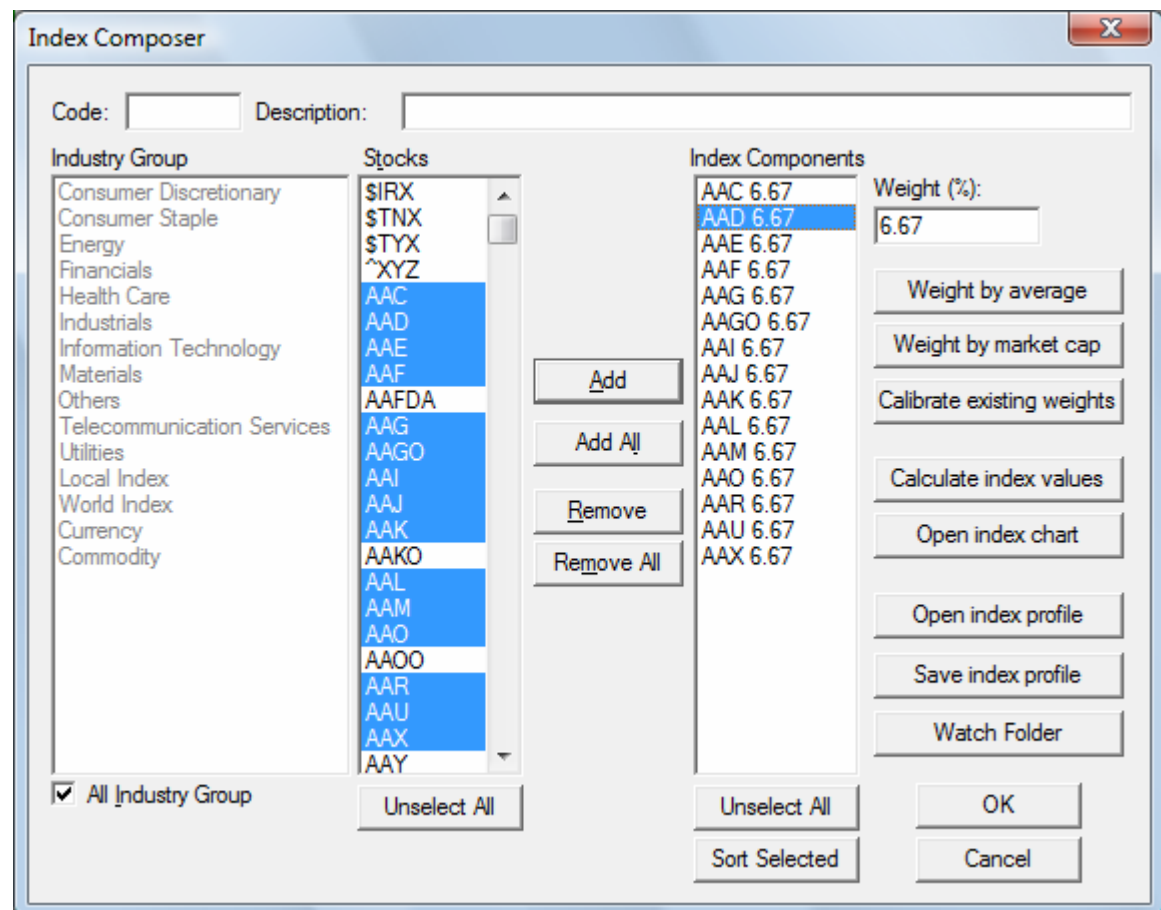


Index Composer

Working with Stock Data

4.9 INDEX COMPOSER

Index Composer will allow you compose your own index to reflect the market performance of certain stocks in a designated category. The benefit of building your own index is to allow you view the overall performance of a group of stocks. To open Index Composer, select Index Composer from Edit menu. The following window will appear.



When it is open, the Code edit box is blank where you can enter an index code, followed by an optional Description field. If you have an existing index that you want to open, simply type the index code in the Code edit box and click Open index profile button. Then the Description field and Index Components list box will be filled with the retrieved information.

With the Index Composer, you can add/remove stocks from the Index Components list box. The number following each index component is the weight of the component. Initially, the weights for each selected stocks are zero. You can use "Weight by average" or "Weight by market cap" button to assign weights.

When you select each item in the Index Components list box, its corresponding weight will be displayed in the Weight field where you can make changes. After making weight changes, you will need to use Calibrate existing weights button to calibrate the weights so that the total of weights is 100%.

Once you are happy with your index components and their weights, you can use Calculate Index Values button to calculate the index values for each date. Its

Index Composer

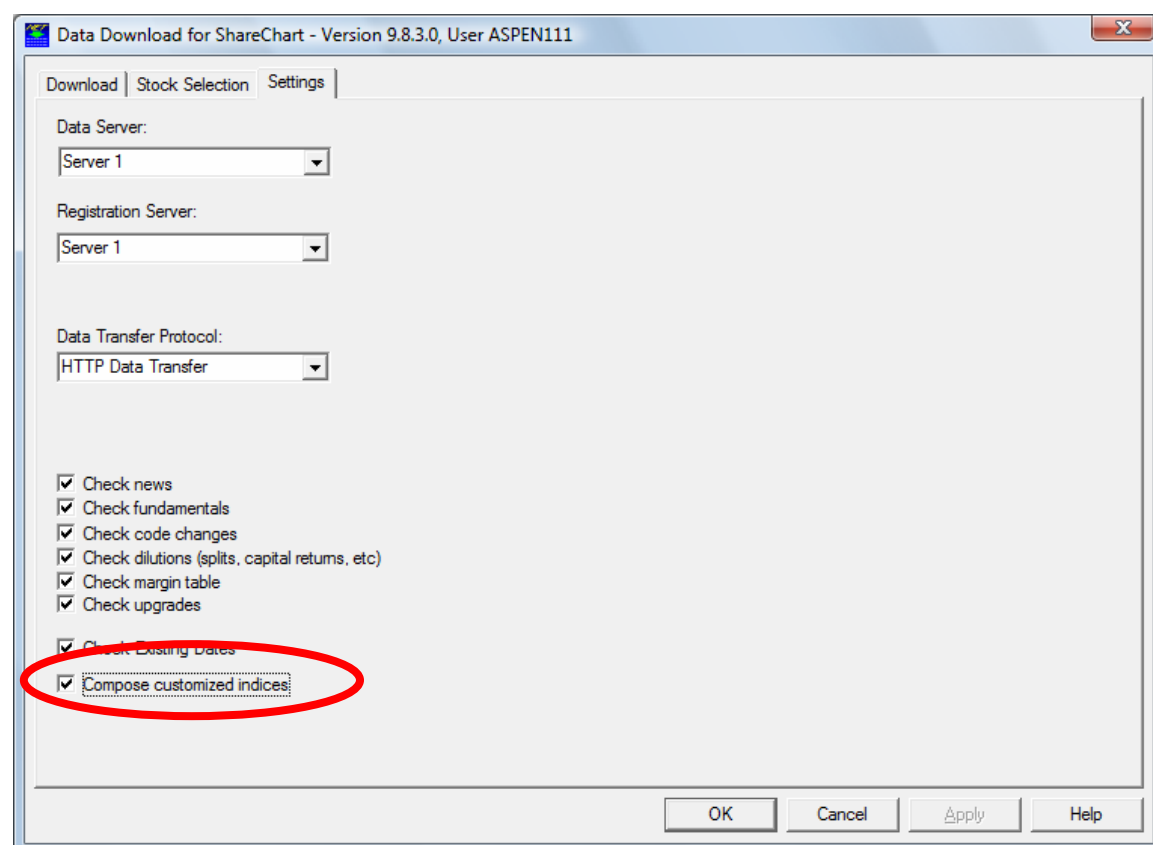
Working with Stock Data

calculated values will be saved to a file that is treated same as a stock file. Its chart can be open by clicking Open index chart button. The index components and weights will also be saved to the index profile when the calculation is complete.

You can open an existing index profile by clicking Open index file button or save the current edited index components and weights to an index profile by selecting Save index profile button.

To make it easy to view charts of all index components, you can use Watch Folder button to add the index components into the current open watch folder where you can view each stock. For more information on how to use watch folders, please read Section 3.5.1 Watch Folders.

If you want to update the index values through data download, you can simply tick the Compose customized Indices checkbox from the Settings page of Data Downloader, as shown in the following box. By ticking this checkbox, you instruct the downloader to search for all saved index profiles and calculate their values according to the weights in each index profile.



CHAPTER 5 WORKING WITH DRAWING

5.1 PALETTE BAR

ShareChart has provided a rich set of drawing tools that can be accessed from the Palette Bar. The following are buttons on the Palette Bar. For each button below, their use and how to draw them are also described.

No Draw

When this button is pressed, no drawing is in place.

Text Draw

When this button is pressed, the cursor will turn to a narrow Y line. Move the cursor to the position that you want your text to be placed and click the left button. Type in your text and click anywhere except the text box, or simply press the enter key.

Up- Signal

The Up Signal is the sign of buying. To draw the Up Signal, simply click on the Up Signal button. The cursor will turn to the up signal. Move to the desired position, and press the left button.

Down- Signal

The Down Signal is the sign of selling. To draw the Down Signal, simply click on the Down Signal button. The cursor will turn to the down signal. Move to the desired position, and press the left button.

Horizontal Line

You can use the Horizontal Line button to draw support or resistance, which may reflect price concentration. To draw a horizontal line, press the Horizontal Line button, the cursor will be attached with the horizontal line with price indication at the cursor. Move to the desired position and press the left button to draw the horizontal line.

Vertical Line

You can use the Vertical Line button to draw the date of possible price/trading actions. To draw a vertical line, press the Vertical Line button, the cursor will be attached with the vertical line with date indication at the cursor. Move to the desired position and press the left button to draw the horizontal line.

Cross Hair

Use cross hair to draw both horizontal and vertical lines to enhance the alignments with prices and dates. To draw the cross hair, press the Cross Hair button. Since cross hair is only the indication of the cursor position, cross hair will not be saved as a drawing object.

Line

You can use Line to draw support or resistance lines to assist your analysis. To draw a line, press the Line button, the cursor will be attached with a line sign. Move to the first position of the line and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Arc

You can use arc to draw support or resistance lines that are not appropriate to represent by straight lines. To draw an arc, press the Arc button, the cursor will be attached with an

arc sign. Move to the first position of the arc and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Rectangle

You can use a rectangle to draw the range of price movement. To draw a rectangle, press the Rectangle button, the cursor will be attached with a rectangle sign. Move to the first position of the rectangle and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Circle

You can use circle to draw the range of price movements as an alternative to the rectangle. To draw a circle, press the Circle button, the cursor will be attached with a circle sign. Move to the first position of the circle and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Support/Resistance

Support/Resistance consists of seven horizontal lines. The first line and the last line are used to align the high and low points of the prices of the current wave. The middle line is just half of the top and bottom lines. The second, third, fifth and sixth lines are 0.236, 0.382, 0.618, and 0.764 of the top and bottom lines respectively. They are used to draw the possible support or resistance. To draw the Support/Resistance, press the Support/Resistance button, the cursor will be attached with a Support/Resistance sign. Move to the first position of the Support/Resistance and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Fibonacci Cycle

Fibonacci Cycle draws the vertical lines using Fibonacci numbers. The nth line from the cursor is the nth Fibonacci number of days from the cursor. They are used to draw possible turn points of the price movement by the Fibonacci cycle. They can be extended beyond the last day's price. To draw the Fibonacci Cycle, press the Fibonacci Cycle button, the cursor will be attached with a Fibonacci Cycle sign. Move to the desired position of the first day of the Fibonacci Cycle and press the left mouse button.

Speed Resistance

Speed Resistance Lines also called Fibonacci Fan Lines consist of seven lines. These lines are used to draw possible price support or resistance. The drawing of the lines is based on the rectangle around it. The middle line passes the opposite corner of the rectangle. The first, second and third lines are 1/4, 1/2, and 3/4 of the right vertical edge of the rectangle. The fifth, sixth, and seventh lines are 3/4, 1/2, and 1/4 of the top horizontal edge of the rectangle. To draw the Speed Resistance lines, press the Speed Resistance button, the cursor will be attached with a Speed Resistance sign. Move to the first position of the Speed Resistance and press the left mouse button. Move the cursor to the next point of the underline rectangle and release the left mouse button.

Gan Fan

Gan Fan Angles consists of nine trend lines. These lines are used to draw possible price support or resistance in a different way from Speed Resistance lines. The first to the last lines are of 7, 15, 18.75, 26.25, 45, 63.75, 71.25, 75, and 82.5 degrees respectively. To draw the Gan Fan lines, press the Gan Fan button, the cursor will be attached with a Gan Fan sign. Move to the desired position of the Gan Fan and press the left mouse button. Then held the left mouse button, those nine lines will go any position or direction where with your mouse movement. When moving the mouse, the degree between those lines will not be changed. Move the mouse to the right direction and press the left mouse button to draw the Gan Fan.

Standard Error Channel

Standard Error Channel draws a linear regression line in a date range as a center-line, and draws two parallel lines on each side using its standard error as the distance. To draw the Standard Error Channel, press the Standard Error Channel button, the cursor will be attached with a vertical line. Move to the first position of a date and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Standard Deviation Channel

Standard Deviation Channel draws a linear regression line in a date range as a center-line, and draws the two parallel lines on each side using its standard deviation as the distance. To draw the Standard Deviation Channel, press the Standard Deviation Channel button, the cursor will be attached with a vertical line. Move to the first position of a date and press the left mouse button. Move the cursor to the next point and release the left mouse button.

Price Extension

Price Extension is used to draw price extensions for a selected trading range, according to the percents specified in the chart drawing settings.

To use price extension, simply press the price extension icon then with mouse find a low or high point on graph and press down the left button and drag down to a high or low point on the graph, then release the left button.

For more information on drawing price extension, please see Section **5.2.2 Price Extension**.

Price Retracement

This tool is similar to the Fibonacci Support/Resistance retracement in concept. Unlike Fibonacci Support/Resistance, you can specify any retrace percentage levels with price extension.

To use, simply select the price retracement icon from Palette Bar then with mouse find a low or high point on graph and press down the left button and drag down to a high or low point on the graph, then release finger from the left mouse button.

For more information on drawing price retracement, please see Section **5.2.3 Price Retracement**.

Price Cycle

The Price Cycle tool allows you to graphically display cycle periods in a graph. The default is set at 10 periods with a cycle edge width of 15%. This means it will plot lines between a 10-day period on a daily chart. The three lines that appear are 0 days, a midpoint and 10 days. Cycle edge width is shaded on either side of the 10th day (15% on either side of this line).

To use, simply select the price cycle icon from Palette Bar, point to the point where the cycle starts, then release finger from the left mouse button.

For more information on drawing price cycle, please see Section **5.2.4 Price Cycle**.

Percentage Change

Percentage Change drawing tool draws the change in percentage between two price points. This will allow you view the percentage change between two price points without manually calculating the change.

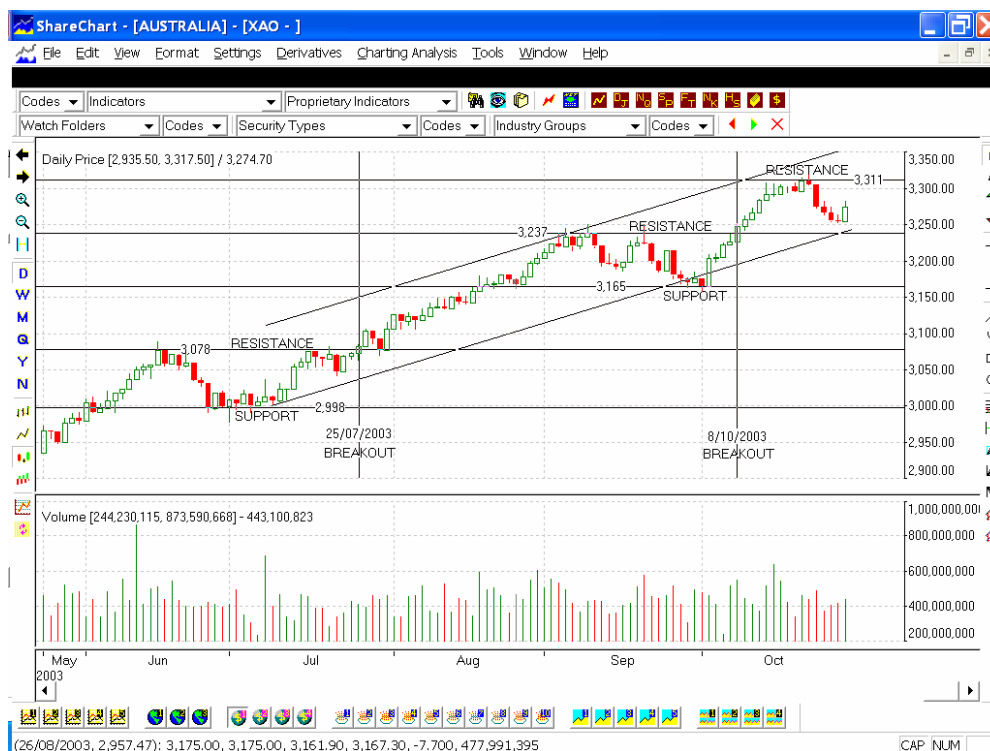
Palette Bar

Working with Drawing

To draw a percentage change, press the Percentage Change button, the cursor will be attached with a percentage change sign. Move to the first position on the chart and press the left mouse button. The percentage change text will show when you move the mouse cursor.

5.2 DRAWING PROPERTIES

All above lines can be referred to as drawing objects. They are used to annotate charts for analysis that will be easier for you to identify trading opportunities. Below is an example of how you can use drawing objects:




When in non-drawing mode, pressing the left mouse button will highlight the nearest line object relative to the cursor. The following operations can be applied to all drawing object.

Deleting Drawing Objects

You can delete the highlighted drawing object by selecting Edit < Delete Drawing Object. You can also delete the nearest drawing object by right clicking on the drawing object and selecting Delete Drawing Object from the popup menu. Or you can simply press the Del key to delete the selected drawing object.

To delete all drawing objects, select Edit < Delete All Drawing Objects. Alternatively, you can right click the mouse and select Delete All Drawing Objects from the popup menu.

Moving Drawing Objects

When a drawing object is selected, you can move the cursor onto the object and move the object when the cursor turns to moving symbol .

Resizing Drawing Objects

When the cursor turns to , you can drag the object to change its shape or size.

Copying Drawing Objects

To copy the selected drawing object, simply hold on CTRL key while moving the object.

Extending Drawing Objects

Drawing Properties

Working with Drawing

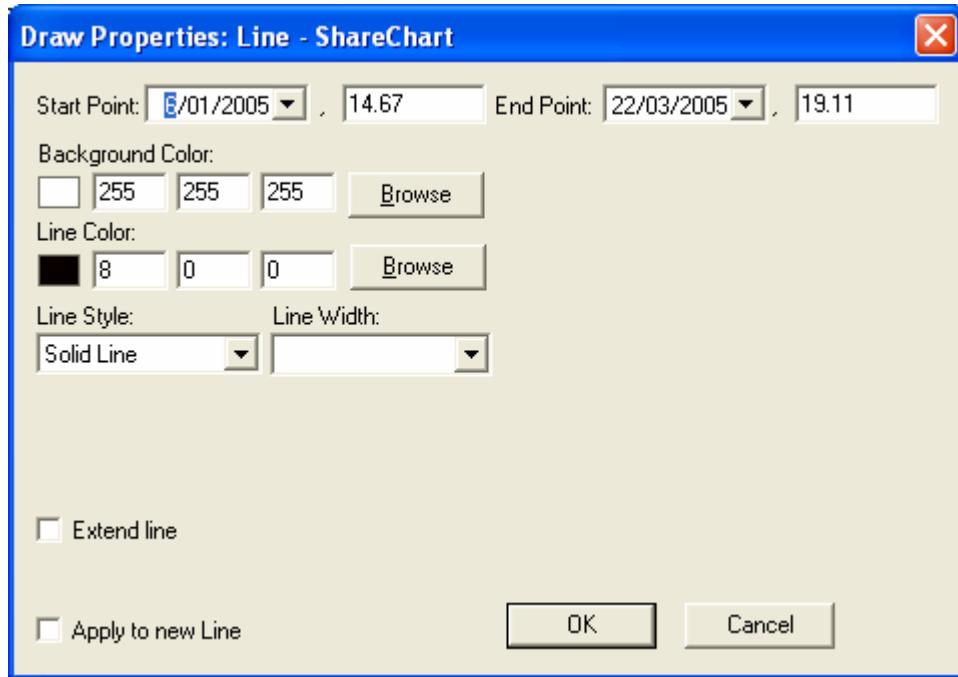
For certain drawing objects such as Line, Standard Error Channel and Standard Deviation Channel, you can extend the lines by selecting "Extend Trend Line" in the Chart Settings dialog box. To draw an extended line, select "Extend Trend Line" in the Chart Settings dialog box, draw a line. The line will be automatically extended when left button is released.

You can change the properties for a drawing object by highlighting the drawing object and pressing right button. Then choose the "Properties" from the popup menu. The following figure shows selecting Line as an example.



Once you select the Properties menu item, the Properties box will appear, as shown below. In the dialog box, you can change Background Color, Line Color, Line Style and Line Width. You can even change end points manually. If you tick "Apply to new Line" check box, you instruct ShareChart to apply the current properties to the next drawing line. Of course, you can set to extend the line with the Properties dialog box.

Drawing Properties



Draw Properties: Line - ShareChart

Start Point: 01/2005 , 14.67 End Point: 22/03/2005 , 19.11

Background Color: 255 255 255 Browse

Line Color: 8 0 0 Browse

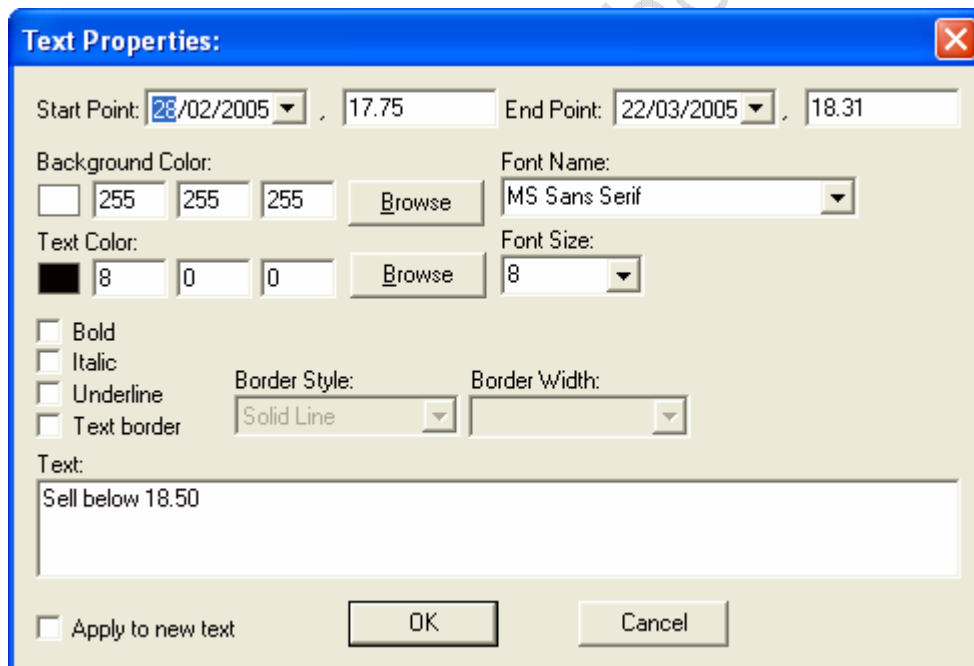
Line Style: Solid Line Line Width:

☐ Extend line

☐ Apply to new Line

OK Cancel

For text drawing objects, a different Properties dialog box will appear, as shown below. It includes additional features related to text, such as Font Style, Font Size, Font Name, Border Style and Border Width.



Text Properties:

Start Point: 28/02/2005 , 17.75 End Point: 22/03/2005 , 18.31

Background Color: 255 255 255 Browse

Text Color: 8 0 0 Browse

Font Name: MS Sans Serif

Font Size: 8

☐ Bold
☐ Italic
☐ Underline
☐ Text border

Border Style: Solid Line Border Width:

Text:
Sell below 18.50

☐ Apply to new text

OK Cancel

For price movement objects such as Price Extension, Price Retracement and Price Cycle, another dialog box will appear, as shown below. In the box you can change or reset Percentage Level.

Drawing Properties

Working with Drawing

Draw Properties: Price Extension - ShareChart

Start Point: 30/04/2004 , 11.21 End Point: 18/10/2004 , 11.48

Background Color: 255 255 255 Browse

Line Color: 8 0 0 Browse

Line Style: Solid Line Line Width:

Percentage Level: Add

E1(11.21)
150(28.02)
19.1(13.34)
38.2(15.51)
50(16.80)

Modify
Change Color
Delete

☒ Price extension on price
☐ Extend line
☒ Text on right

☐ Apply to new Price Extension

OK Cancel

The first row of the draw and text properties dialog box shows the coordinates of starting and end points of a drawing object in date and actual price. You can manually modify the coordinates. For drawing objects such as up arrow, down arrow, horizontal line, and vertical line, only Start Point is shown.

5.3 SPECIAL DRAWING OBJECTS

Some special drawing objects need more explanation. They are as follows.

5.3.1 Price Extension



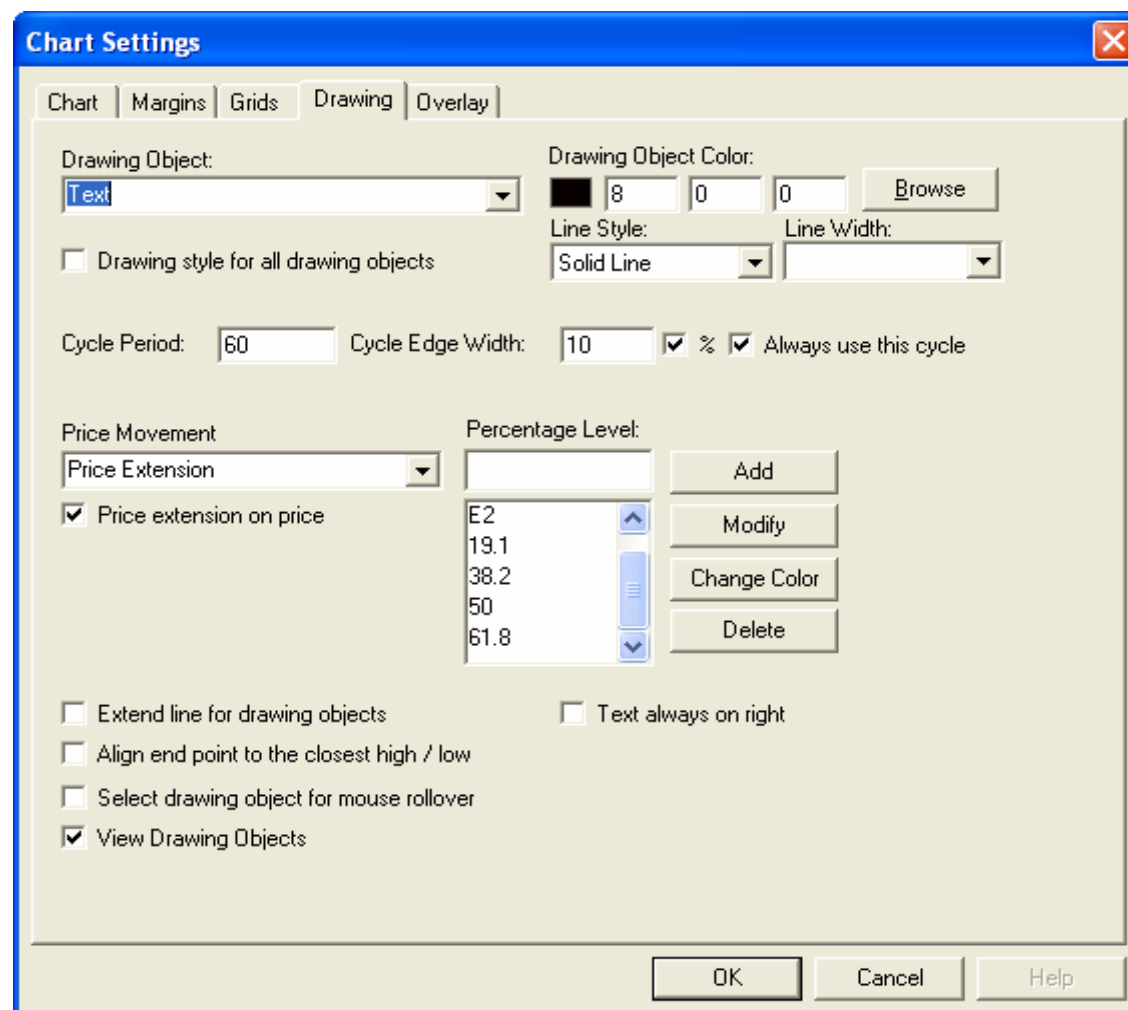
This example above shows a price extension from a low in Mar 2000 to a top in May 2000. This price extension was then duplicated (using the CTRL button as mentioned above) and placed from the low in May 2003 and as the graph illustrates it an approx equivalent range on the leg up to a high.

For stocks that do not have consolidation periods, it is not possible to draw a price range. Therefore, the above procedure would not be suitable for stocks without a trading range. In this case, the Price Extension tool is extended to include the percentage calculation based on the low price. The price extensions are then based on the low price rather than on price range. This is useful for stocks with significant surge in price and use price extension based on the low price to predict possible resistance during price surge. When drawing from a high price, it is used to predicted possible supports during sharp price fall.

The price extension on high or low price is realized by ticking "Price extension on price" in the Drawing page of "Chart Settings" and setting the percentage level that you wish to calculate as shown in the following figure.

Special Drawing Objects

Working with Drawing



The percentage levels based on the low or high price are normally Fibonacci numbers. When dragging down from a high or low price on charts, then the results will present in the format of what you set in the chart setting. That is drag down to higher direction, then results should be in $(1 + \%) \times \text{price}$. Drag to lower direction, it should be $\% \times \text{price}$. For example, if set the percentage 19.1%, 32.8%, 50% and 61.8%, then the graph should be:

Special Drawing Objects

Working with Drawing



5.3.2 Price Retracement

In price extension, the default three lines appear: 0% - R1 (0%) being the starting point, R2 (100%) being the ending point and 50% being the midpoint.



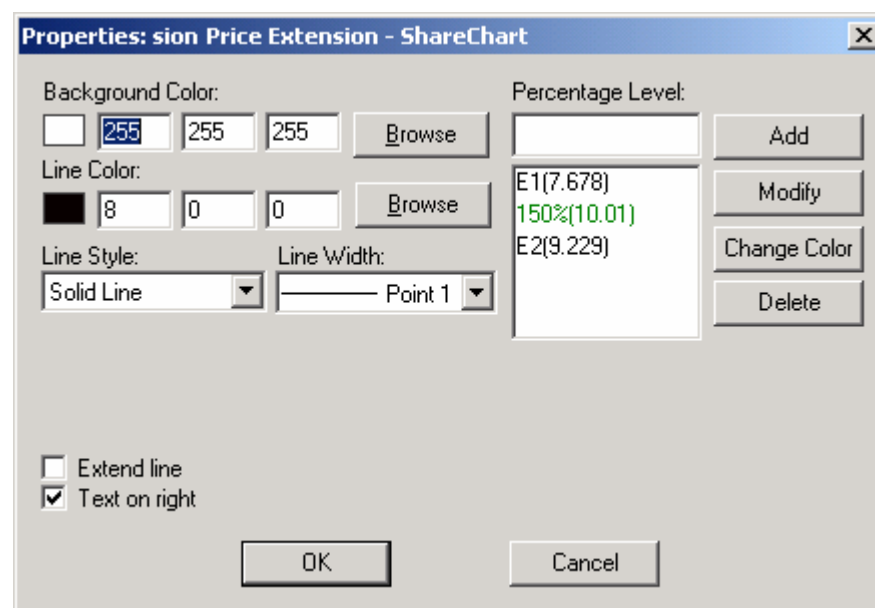
Special Drawing Objects

Working with Drawing

Notice the above stock MTT found support at the 50 % retracement line.

To add further retracement points as lines, simply highlight the existing retracement lines on the graph, then right click the mouse button where a drop menu will appear, select 'properties' where you can add or remove retracement points, then press 'ok' to save changes.

You can always change the settings, especially price percentage levels, for the drawn price movement object: price extension or price retracement. To change, simply right click on the price movement object and select "Properties" from the popup men. The following properties dialog box will appear.



Where, you can change settings for the drawn object. You can add, modify, or delete the percentage levels. To add a percentage level, simply type a percentage in the "Percentage Level" edit box, and click "Add" button. The added percentage will be assigned color from the "Line Color" field. You can change the color for a percentage level by selecting it from the "Percentage Level" list box and clicking "Change Color" button.

You can decide whether you want to extend the price movement to the right by selecting "Extend line" check box. You can also choose to place text on left or right by selecting "Text on right" check box. When you initially draw the price movement object, placement of the text will depend on whether you draw the object from left to right or from right to left.

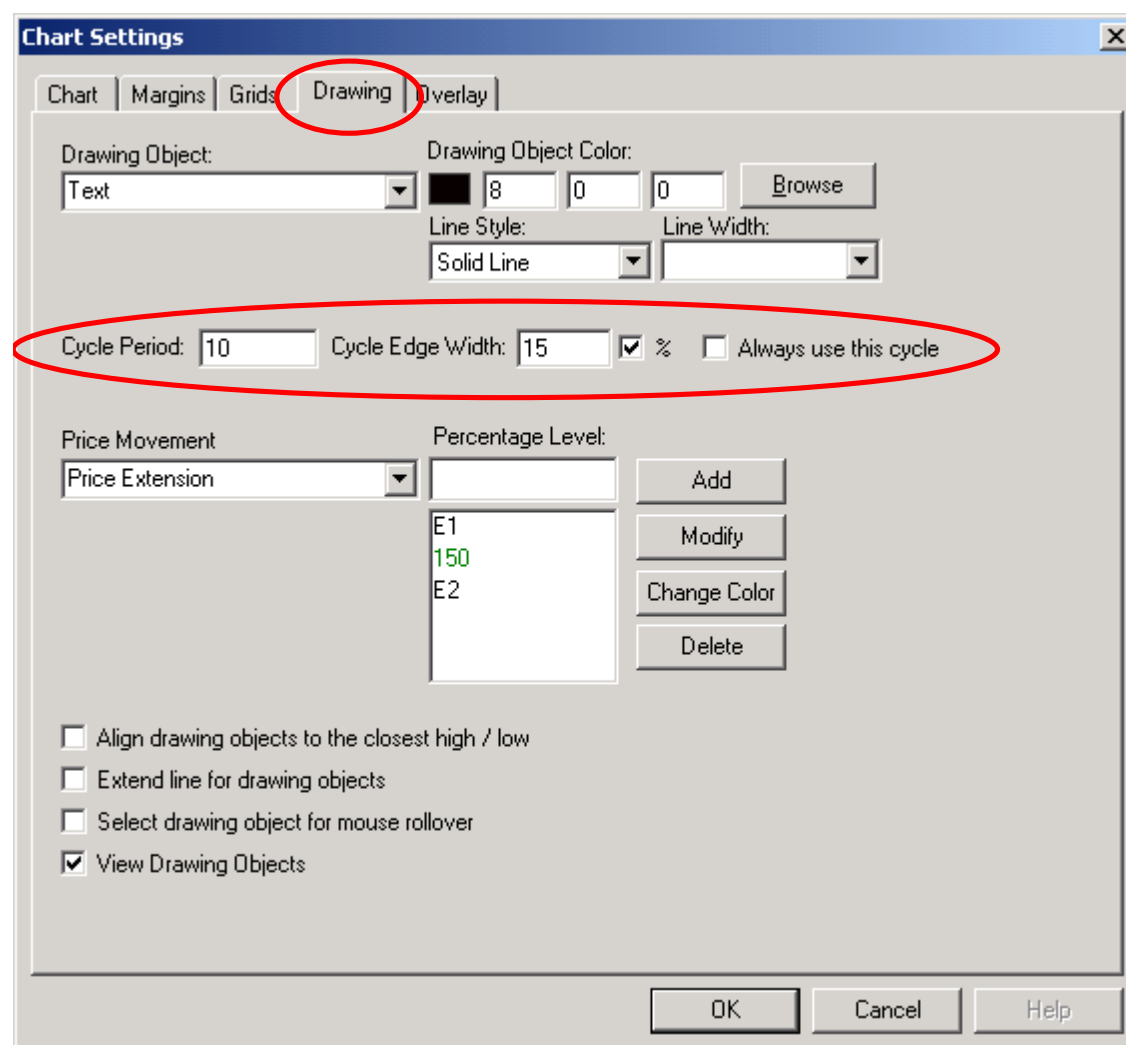
5.3.3 Price Cycle

To change the default settings for Price Cycle, go to Settings<Chart Settings<Drawings and here you can modify the Price Cycle period and the cycle edge width. Notice if you select the 'Always use this cycle' box it will apply the same cycle to all stocks alike.




Alternatively, you can modify existing price cycle on graph by highlighting it and then right clicking mouse button where a drop menu will appear, select 'properties' where you can modify price cycle settings, then press 'ok' to save changes.

Special Drawing Objects

Working with Drawing



To use the price cycle tool, simply select the price cycle icon from Palette Bar then with mouse find a section on the graph you want to place the price cycle on and press the left button on mouse once to release. Three lines appear: the start of the price cycle (day 0), the midpoint and the end of the price cycle (Day 10 if on default or the period you specified in the above box if modified).

ShareChart can automatically calculate an average cycle period for you if you mark cycle lows at historical data. To mark cycle lows at historical data, select up arrow button  from the Palette Bar, draw each  at all major bottoms or lows and ShareChart will average out the price cycle for you. When you use the price cycle icon after this it will average out the price cycles between low points (). You can, of course, turn off this feature by selecting Settings < Chart Setting and tick "Always use this cycle" check box.

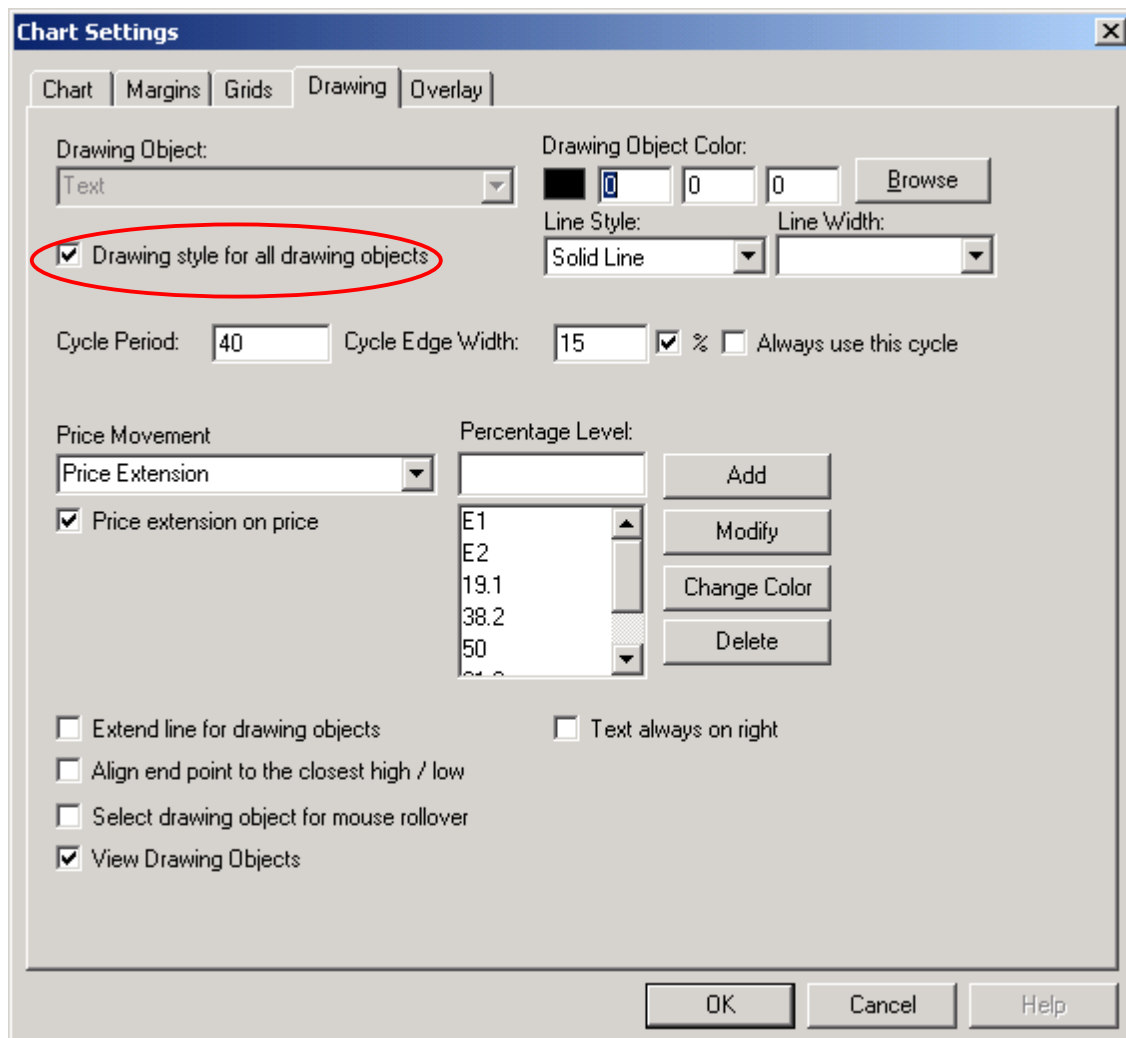
5.4 FORMAT BAR

Format Bar provides a quick way to format a drawing object, e.g. line style or color, and fonts for text objects. The following depicts the Format Bar.



Instead of using Properties to change the attributes of a drawing object, you can use Format Bar to change the attributes. When you select a drawing object, you can change line width, line style and color for the selected object quickly by selecting the corresponding buttons on the Format Bar. If the selected drawing object is text, you can also change the text attributes, such as fonts.

To allow this feature working properly, you will need to go to Settings<Chart settings<Drawing, and tick the box of "Drawing style for all drawing objects", as shown below.



Ticking this box will apply the attributes from the Format Bar to any new drawing objects. To change new attributes while drawing a new object, simply click buttons on the Format Bar accordingly.

Format Bar



Working with Drawing

If you do not tick the “Apply drawing style for all drawing objects” box from the Drawing page of Chart Settings, ShareChart will assume that you want the different attributes for different drawing object while drawing a new object. In this case, you need to set the attributes for each drawing object from the Drawing page of Chart Settings dialog box.

An Example of Using Format Bar

For example, you want to draw a vertical line, select the Vertical Line button on the Palette Bar. Draw it on screen, a black vertical line appears:



Then go to Format Bar, change color into blue: , and change line style from “solid line” into “dash line”: . The vertical line is changed as follows.

Format Bar



CHAPTER 6 WORKING WITH INDICATORS

ShareChart has incorporated most of the popular indicators such as Moving average, MACD, Stochastic oscillator, Price Rate of Change (ROC), On Balance Volume (OBV), and Bollinger Bands. To use these popular indicators, simply click on the Indicator dropdown box and select the desired indicator.

If an indicator is selected, it will be preceded by a '+' sign in the Indicator dropdown box. To click the indicator with '+' will deselect the indicator and '+' will disappear in front of the indicator.

Alternatively, you can select indicators from the Chart Settings dialog box, which can be opened by selecting Settings < Chart Settings.

If you are using Standard Version or higher of ShareChart, you will be able to open the proprietary Indicator dropdown box. The indicators in this dropdown box are powerful indicators developed by Sharechart, such as Price Cluster, Stop Loss, etc. You can operate the proprietary indicators in the same way as the popular indicators.

For most indicators, parameters such as periods and color of lines can be customized according to your preference. Setting these parameters is described in Section 6.1 *Setting Indicators*.

Our website: www.sharechart.com.au has provided a wide range of comprehensive technical documents on all indicators covered in ShareChart. Please visit our website to view more details about these indicators.

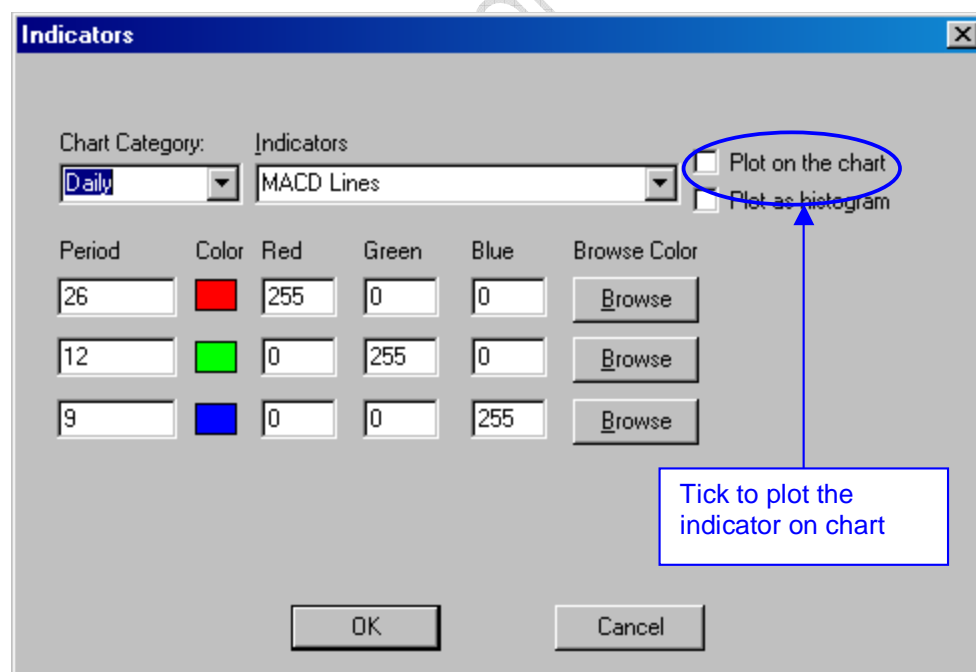
6.1 SETTING INDICATORS

While chart open, you can select an indicator from the Indicator dropdown box, as shown below.

Setting Indicators



Most trend follow indicators, such as moving averages, will be plotted on the same chart window. Most oscillator and volatility indicators are plotted in a separate window. However, you can decide whether you want to plot on chart or in a separate window by ticking "Plot on chart" check box, as shown below. This box can be accessed from Settings < Indicators.



Once the indicator is turned on, there will be a cross sign '+' in front of the indicator in Indicator dropdown box, as shown below.

Setting Indicators

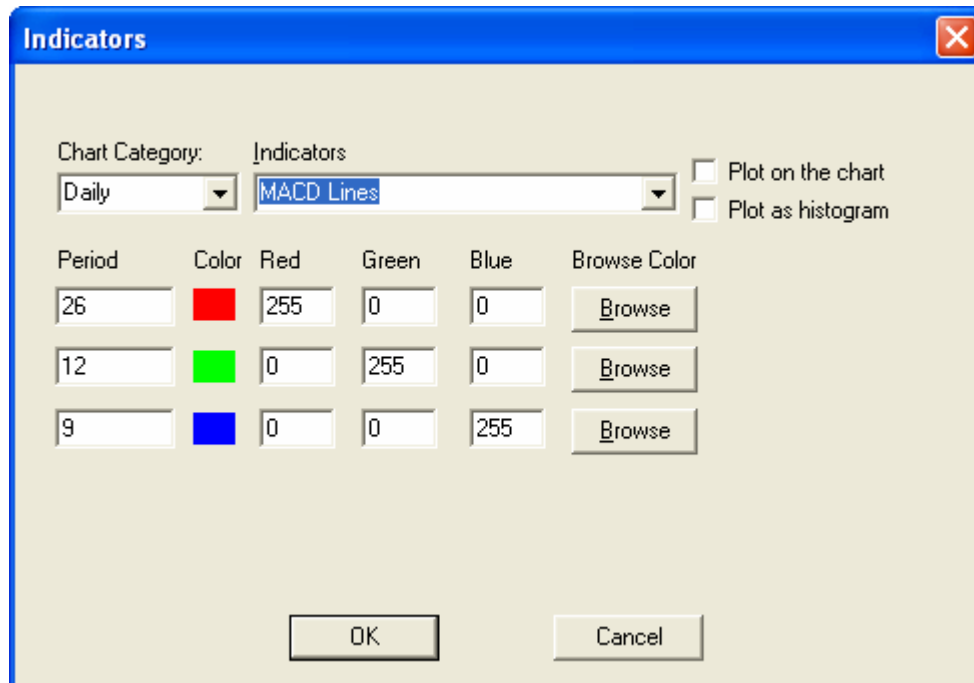


In the above figure, Accumulation/Distribution, MACD Lines, and Moving Averages Groups 1 & 2 are selected and are displayed. To turn off the indicator, simply click the indicator again. The cross sign will disappear.

You can also turn off the indicator by pointing the cursor to the indicator window and right click. Then select Delete Indicator from the popup menu. To turn off all indicators, simply right click anywhere on the chart window and select Delete All Indicators from the popup menu.

6.2 INDICATOR PROPERTIES

You can set properties for an indicator. To set indicator properties, select Settings < Indicators. The following dialog box will appear.

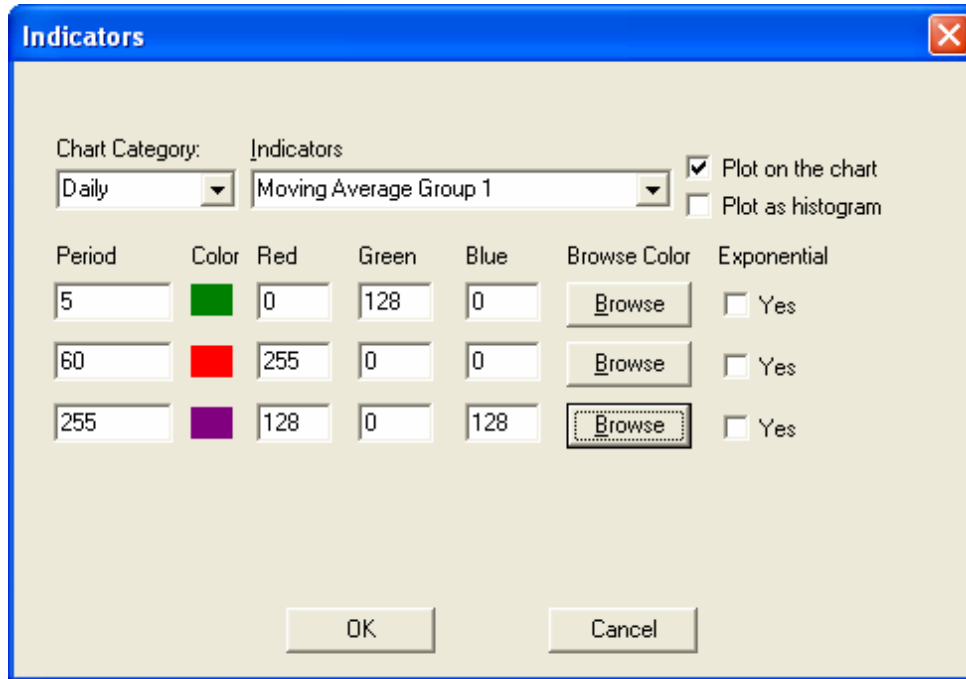


The above indicator settings box is a standard setting box for all indicators.

TIP: There is a quick way to set indicator properties. Simply right click on an indicator window and select Indicator Properties from the popup menu. In this case, the indicator will be selected in the Indicators dialog box. When you right click on chart window and there is no indicator displayed along with the chart, the Indicator Properties menu item is grayed. If more than one indicator is displayed on the chart window, a submenu containing all indicators on the chart is displayed to allow you select a displayed indicator to set properties.

Due to different parameters for indicators, there will be additional fields to be added to the standard Indicator Setting box. For example, when you select Moving Averages Group 1 from the Indicator Dropdown box, the following parameters pertinent to the moving averages will appear, allowing you to turn on/off exponential moving averages.

Indicator Properties

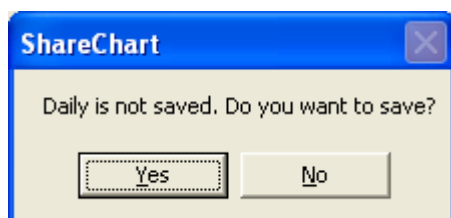


Each indicator settings box has three periods that allow you to plot up to three lines with different periods for an indicator. You can enter zero in the period field to turn off the lines. For example, if you only want use 2 moving averages periods as oppose to the 3 setting periods provided, then enter 0 (zero) in one of the period spaces.

You can use the Browse button to browse colors. Depending on the number of fields for an indicator, the unused fields will be grayed. For example, the Relative Strength Comparison (RSC) indicator has only one period, the settings in Period 2 and Period 3 will be grayed when you select RSC from the Indicator dropdown box.

You can choose whether you want to plot the indicator on the chart window by checking the 'Plot on chart window' check box. If you uncheck the 'Plot on chart window' check box, the indicator will be plotted in a separate window. Because of the different scales of indicators and the chart, it is recommended that you do not change the default setting for this check box unless you want to see different results. For volume indicators such as volume and value, the check box represents 'Plot moving average' which allows you to plot moving averages on the indicators.

You can change indicator properties for each chart category. When you then attempt to set settings for another chart category, it will prompt you for saving the settings for the current chart category. For example, when you change the weekly chart settings from daily to weekly, the following box will appear:



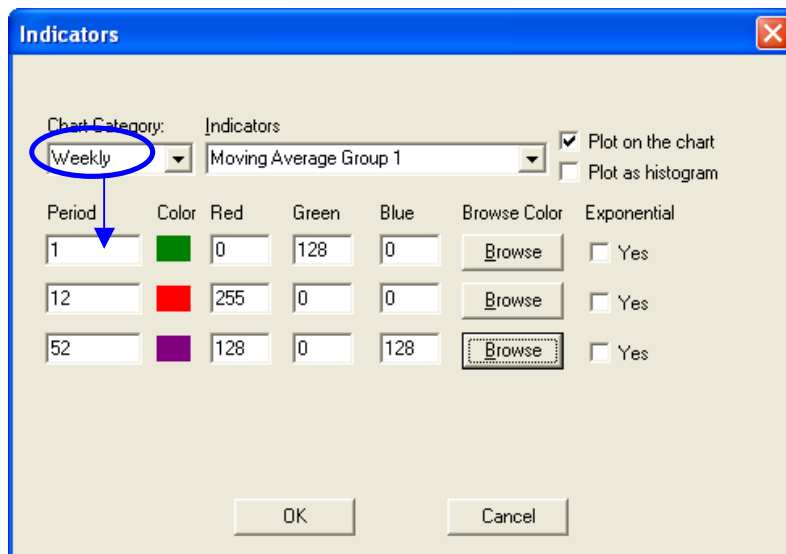
Press "yes" to save. The weekly periods can be modified for settings and color as well. Notice we have chosen same settings/colors as the daily chart:

- 1 week = 5 trading days

Indicator Properties

Working with Indicators

- 12 weeks = 60 trading days
- 52 weeks = 260 days - 5 non-trading days = 255 trading days



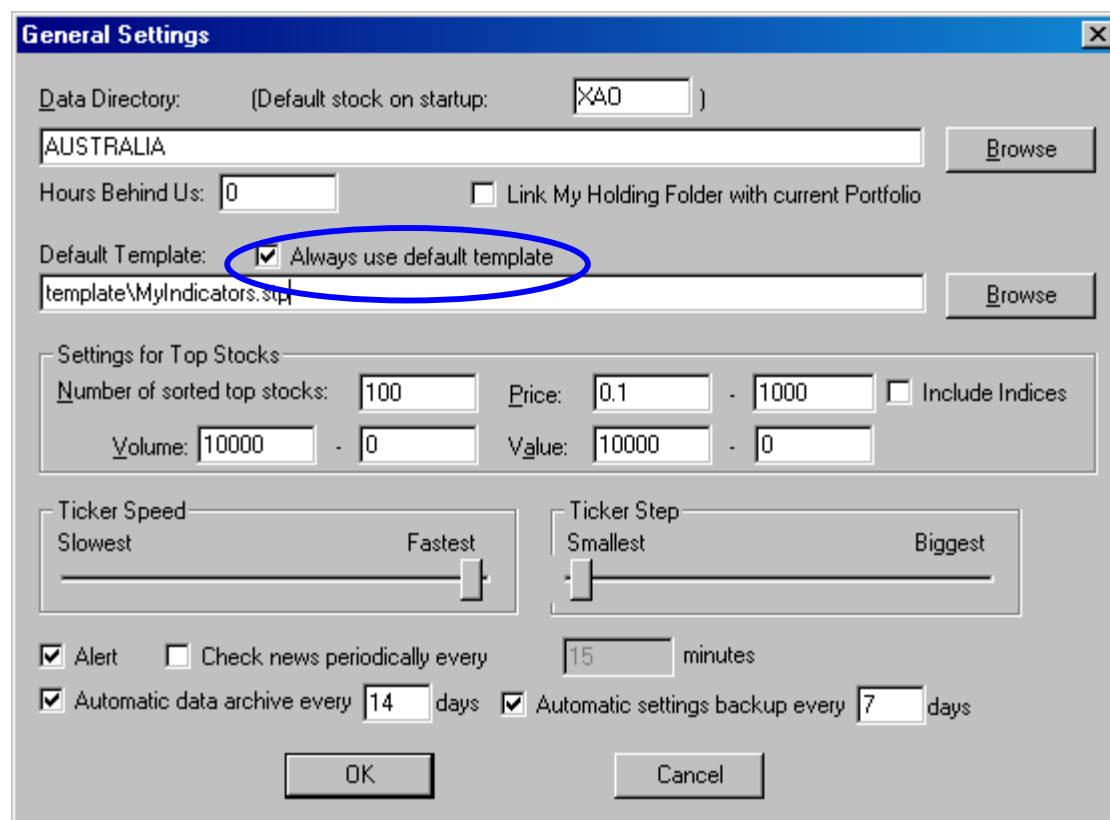
Similarly, you can change settings for other categories in the same way as setting weekly indicators.

6.3 SAVING INDICATOR SETTINGS

Once you have changed the indicator settings in the indicator settings dialog box, settings will immediately take effect when you click OK button to close the Indicator Settings box. When you close the chart, the indicator settings will be automatically saved for the current chart. When you reopen the chart for the stock, all indicator settings will be reloaded automatically.

In most cases, you may want your indicator settings to be saved for all charts. You can do it by saving the settings to a template and assign the template as default template. Here is how.

1. Select File < Save Template, and name a file name to save, e.g. MyIndicators.stp.
2. Select Settings < General Settings, click Browse button on the right side of the Default Template field.
3. In the Open File dialog box, select the template file that you have just saved, e.g. MyIndicators.stp, and Click Open button.
4. Tick "Always use default template" check box, as shown below.
5. Click OK button to close the General Settings box.



Each time you open a chart, the default template will take effect, which will apply your saved indicator settings.

When you open a chart for the first time, the default template will apply no matter "Always use default template" is ticked or not. If no default template is supplied in the "Default Template" field in the General Settings box, ShareChart internal settings will apply.

Saving Settings

Working with Indicators

TIP: You can quickly set the current settings to the current default settings file by right click on the chart and select "Set as Default Template" menu item.

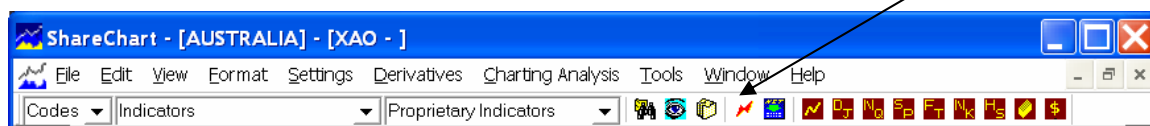
For more information about how to set templates and associate templates to the template buttons on the Customizable Bars, please see section 9.4 Setting Customized Templates. This will allow you to quick access your saved templates.

CHAPTER 7 WORKING WITH ALERTS

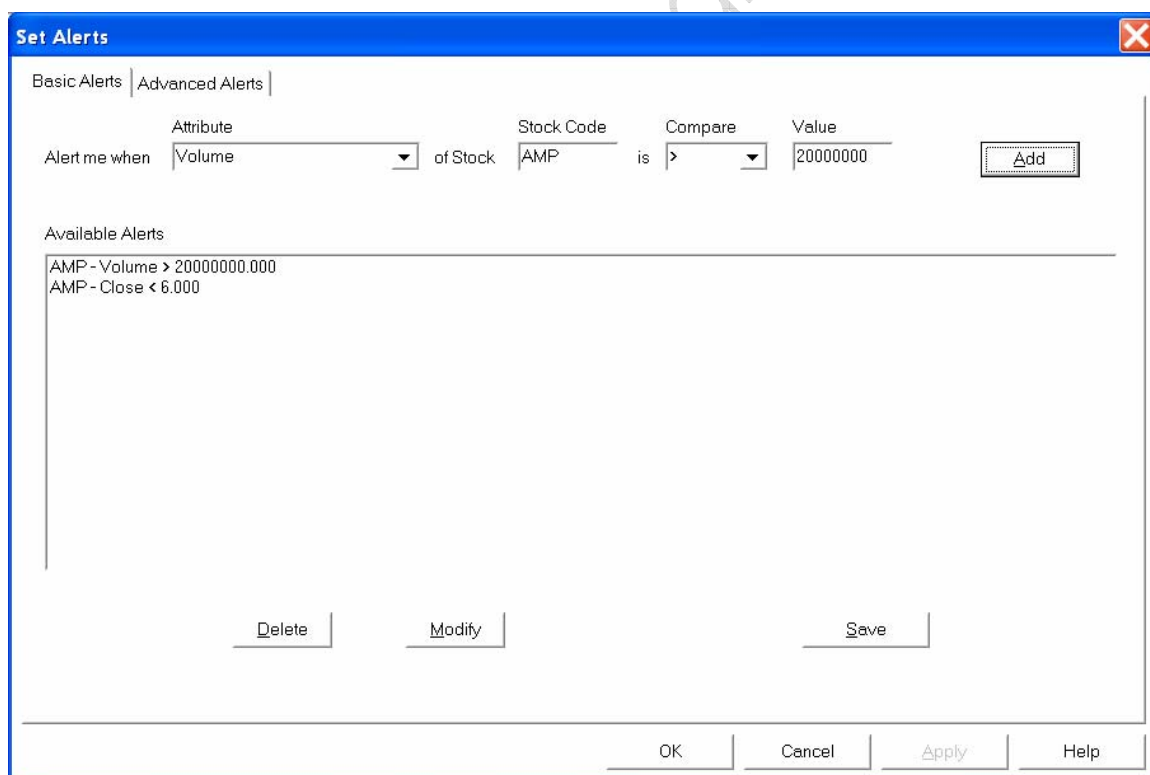
Alerts are used when you want ShareChart to alert you when the price goes above or below your specified criteria. For example, you may want ShareChart to alert you when the closing price for a stock goes below a specified value. ShareChart allows you to be alerted about price or volume movements. You can also set alerts for most indicators. For example, you can set an alert for the 10-day moving average moving above the closing price three days ago by 10%.

7.1 SETTING AN ALERT

To set an alert, go to Settings < Set Alert OR go to the Alerts short cut button  located on your Select Bar at the top of screen:



The following Alert Entry dialog box will appear:



There are two ways for setting alerts:

1. Basic Alerts
2. Advanced Alerts

7.2 BASIC ALERTS

The basic alert setting dialog box is shown above. Setting basic alerts is very straightforward:

- select an attribute
- type a stock code
- select a compare operator
- and specify a value, then click on the "Add" button.

The added alert will appear in the "Available Alerts" list box. If you select an alert in the "Available Alerts" list box, the items of the selected alert will be displayed in the edit boxes above it where you can make changes and click the "Modify" button. You can delete the selected alert by clicking on the "Delete" button. Of course, you can save the alerts in the "Available Alerts" list box by clicking on the "Save" button.

Sharechart

7.3 ADVANCED ALERTS

The advanced alert dialog box is for experienced users. To set advanced alerts, open the "Advanced Alerts" page. The following dialog box will appear:

The list box on the left is the "Value Category" and the list box on the right is the "Alert Category". When you select an alert from the "Available Alerts" list box, the corresponding fields in the upper part will be filled. You can then modify the alerts and then click on the "Modify" button. Or you can simply click on the "Delete" button to delete the selected alert.

The first parameter field above the Value Category and Alert Category list boxes is for the period of indicators. The second parameter is for the moving average and Bollinger Band only. For Bollinger band, positive value stands for upper band standard deviation multiplier and negative value for lower band standard deviation multiplier.

To add an alert,

- Select a value category from the Value Category list box,
- Enter the Stock Code in the middle,
- Fill in all necessary fields,
- Select an alert category from the Alert Category list box

The following is an example of the steps for setting an alert for stock AMP: 10 days exponential moving average today > 60 days simple moving average 3 days ago by 11%.

Step 1 Select Moving Average from the Value Category list box.

Step 2 Enter 10 in the first parameter above the Value Category list box and select "Exponential" in the second parameter.

Advanced Alerts

Working with Alerts

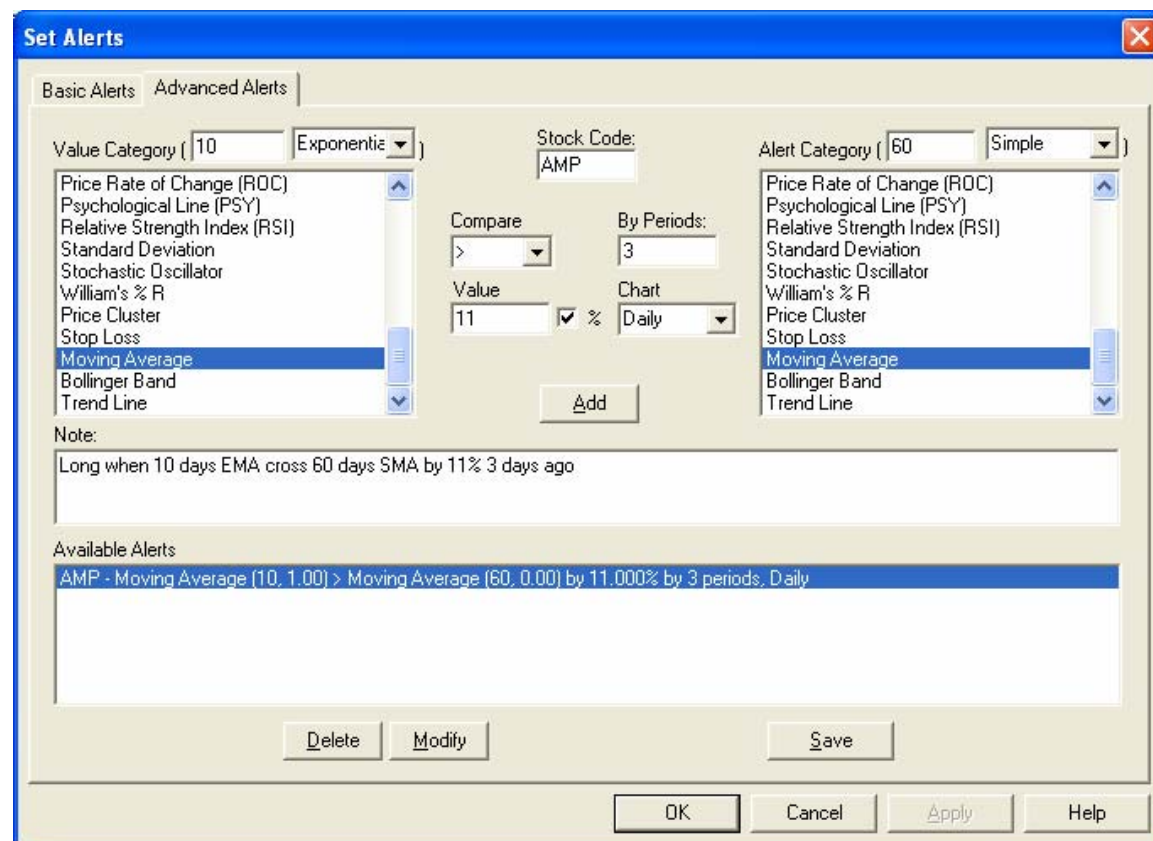
Step 3 Enter "AMP" in the Stock Code field in the middle, enter 3 in By Dates, select Operator as ">", enter 11 in Value field and check %.

Step 4 Select Moving Average in the Alert Category list box

Step 5 Enter 60 in the first parameter above the Alert Category list box and select "Simple" in the second parameter field.

Step 6 Click the "Add" button.

The alert will now appear in the "Available Alerts" list box of the dialog box, as shown in the following figure.



When you finish alert editing, click on the OK button. The edited settings will be saved to a text file StoAlert.stc. You can click on the "Save" button at anytime during editing to save the edited alerts. You can use any text editor to open this file and edit the alert settings manually. Ensure that you always place a header 'ALERT' as the header of the file. However, we recommend that you use the Alert Entry dialog box of SharChart to set alerts.

To enable alerts, tick the Alert check box in the Settings < general Settings dialog box. When ShareChart is in alert mode, ShareChart will prompt an alert message when the price values go above or below your specified criteria. The alert message may when you close the alert setting dialog box, or appear during ShareChart start up, or when building database index is complete.

7.4 DRAWING LINES AS ALERTS

ShareChart has incorporated a powerful drawing line alert mechanism into the program to automatically alert of a share price cross over of that particular line, be it support, resistance or a trending line.


1. Draw a line on chart (example a resistance or support line)
2. Highlight that line, by left clicking on it
3. Right click on that line with mouse and a drop menu will appear
4. Choose "Add Alert"
5. Where you have option to choose
 - i. Long
 - ii. Short
 - iii. Long with note
 - iv. Short with note

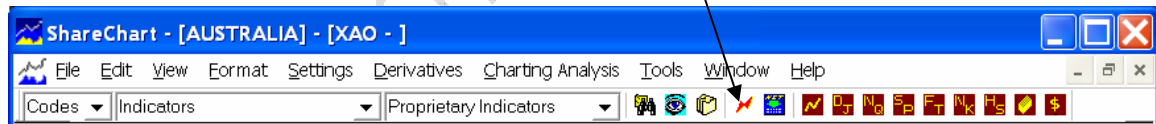
Which option do you choose?

If you are drawing a support line you might select "Short" or "Short with note", as a break of support may result in further deterioration of the share price with panic selling.

Vice versa if you are drawing a resistance line you might select "Long" or "Long with note", as a break of resistance may result in potential buyers rushing into the stock in an attempt to ride the next wave up.

"Short with note" or "Long with note" simply means that you attach a note to your alert. E.g. you might add a note to buy the stock if share price crosses resistance with strong volume and only if overall market conditions are good.

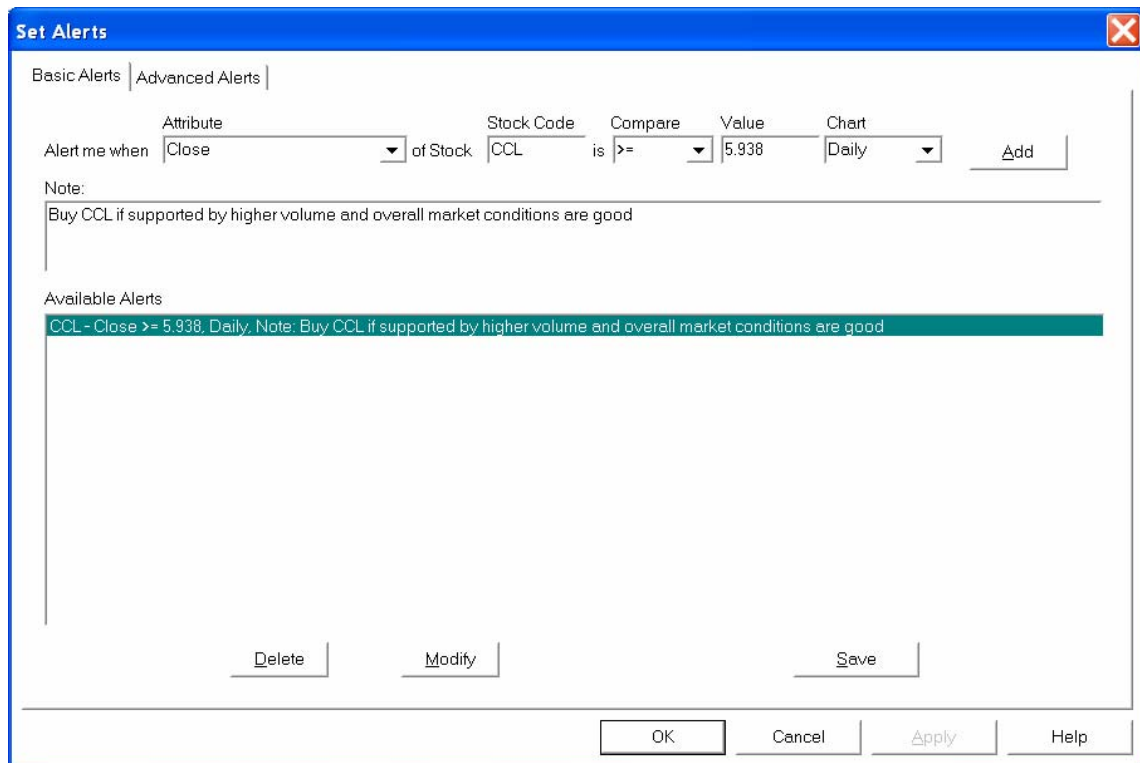
If you have chosen either "Long" or "Short" and you would like to confirm the implementation of that alert go to the Alert button  on your Select Toolbar:



The following box will appear:

Drawing Lines as Alerts

Working with Alerts



The 'Set Alerts' dialog box is shown with the 'Basic Alerts' tab selected. It contains a table for defining alerts with columns: Attribute, Stock Code, Compare, Value, and Chart. The table has one row: 'Alert me when' (Close), 'of Stock' (CCL), 'is' (>=), 'Value' (5.938), and 'Chart' (Daily). There is an 'Add' button to the right of the table. Below the table is a 'Note:' field with the text 'Buy CCL if supported by higher volume and overall market conditions are good'. Below the note is a list of 'Available Alerts' with one entry: 'CCL - Close >= 5.938, Daily, Note: Buy CCL if supported by higher volume and overall market conditions are good'. At the bottom of the dialog are buttons for 'Delete', 'Modify', 'Save', 'OK', 'Cancel', 'Apply', and 'Help'.

Attribute	Stock Code	Compare	Value	Chart
Alert me when	CCL	is	5.938	Daily

Note:
Buy CCL if supported by higher volume and overall market conditions are good

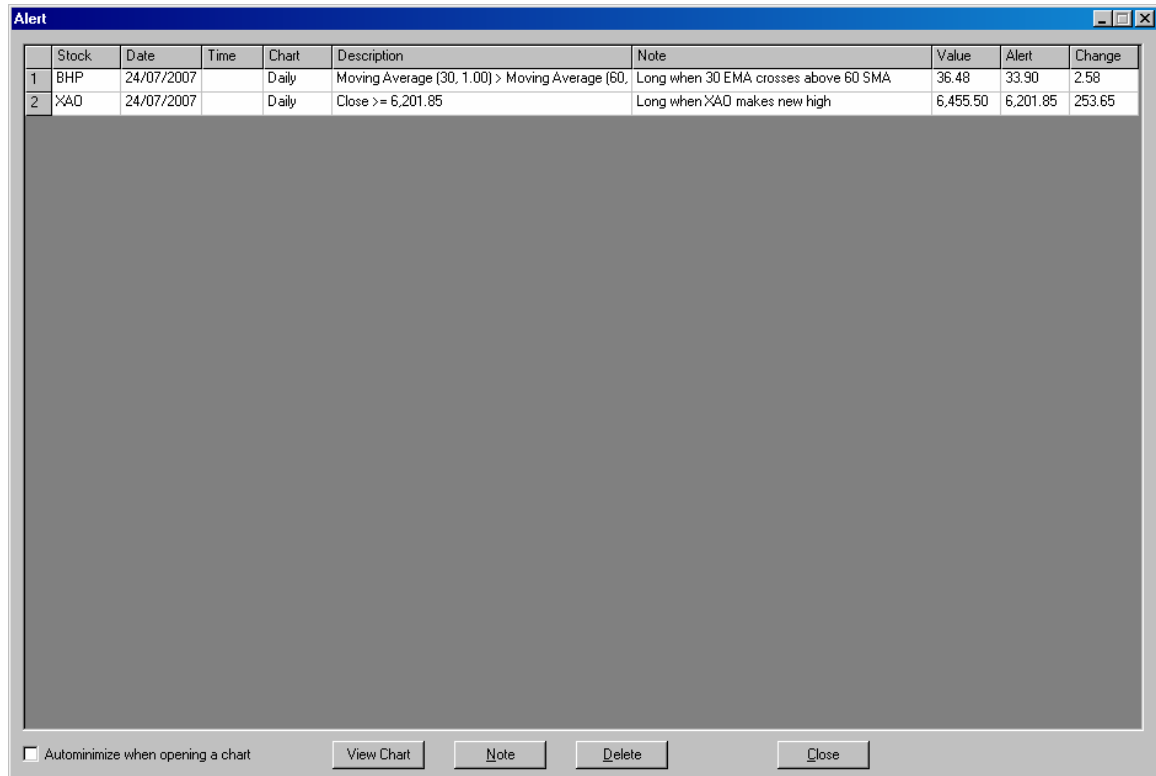
Available Alerts
CCL - Close >= 5.938, Daily, Note: Buy CCL if supported by higher volume and overall market conditions are good

Similarly, you can set alerts for trend lines. If the trend line is used as support, you may set short alert. If the trend line is used as resistance, you may set long alert.

If you want to verify the alerts for trend lines, you should select Advanced Alert page on the Set Alerts dialog box. Since trend line parameters are calculated by ShareChart based on your drawing, it is recommended that you do not change the parameters.

7.5 ALERT VIEW

If the Alert checkbox is ticked in the General Settings, ShareChart will display alert view when you first open ShareChart or when you modify alerts.



In the alert view, you can click View Chart button or double click on each row to open the underlying charts. Clicking on Note button will view Notes for each alert that may be too long to be seen. To delete any alert in the alert view, simply select the alert and click Delete button.


If "Automimize alert view when opening a chart from alert view" is ticked, the alert view will be minimized when you double click on an alert to open its underlying chart.

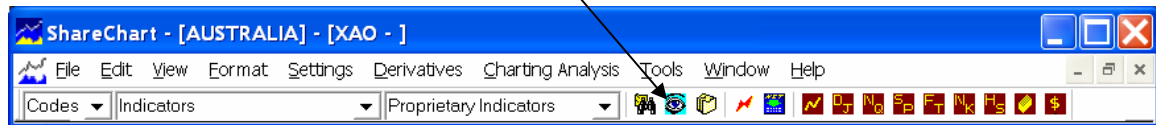
Watch Pages

Watch Page and Portfolio

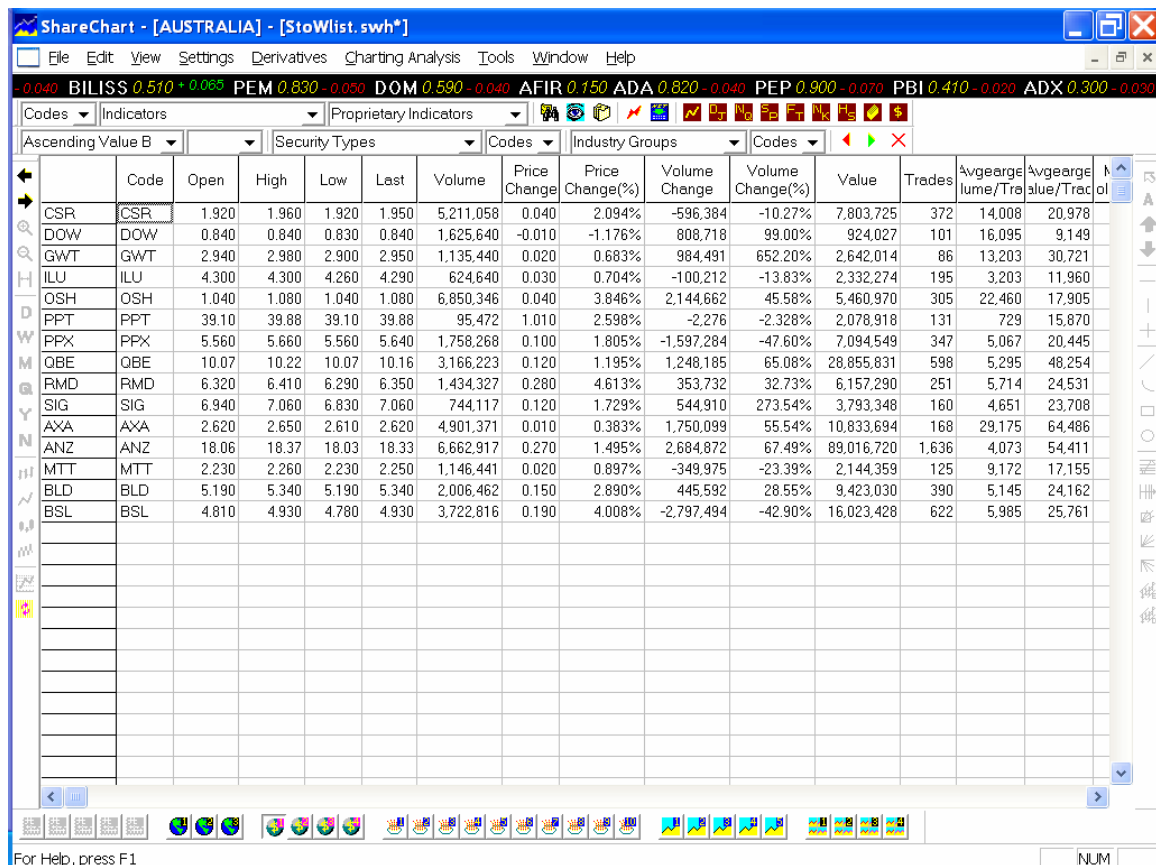
CHAPTER 8 WATCH PAGE AND PORTFOLIO MANAGEMENT

8.1 WATCH PAGES

Watch Pages allow you to watch share or option prices in a page. To open a watch page, click on the Watch Page icon  located on the stock selection bar, or select File < Open Watch Page, and select either Stock Watch or Option Watch.



The following screen will appear for Stock Watch:



	Code	Open	High	Low	Last	Volume	Price Change	Price Change(%)	Volume Change	Volume Change(%)	Value	Trades	Avggearge lume/Tra	Avggearge lue/Tracol
CSR	CSR	1.920	1.960	1.920	1.950	5,211,058	0.040	2.094%	-596,384	-10.27%	7,803,725	372	14,008	20,978
DOW	DOW	0.840	0.840	0.830	0.840	1,625,640	-0.010	-1.176%	808,718	99.00%	924,027	101	16,095	9,149
GWT	GWT	2.940	2.980	2.900	2.950	1,135,440	0.020	0.683%	984,491	652.20%	2,642,014	86	13,203	30,721
ILU	ILU	4.300	4.300	4.260	4.290	624,640	0.030	0.704%	-100,212	-13.83%	2,332,274	195	3,203	11,960
OSH	OSH	1.040	1.080	1.040	1.080	6,850,346	0.040	3.846%	2,144,662	45.58%	5,460,970	305	22,460	17,905
PPT	PPT	39.10	39.88	39.10	39.88	95,472	1.010	2.598%	-2,276	-2.328%	2,078,918	131	729	15,870
PPX	PPX	5.560	5.660	5.560	5.640	1,758,268	0.100	1.805%	-1,597,284	-47.60%	7,094,549	347	5,067	20,445
QBE	QBE	10.07	10.22	10.07	10.16	3,166,223	0.120	1.195%	1,248,185	65.08%	28,855,831	598	5,295	48,254
RMD	RMD	6.320	6.410	6.290	6.350	1,434,327	0.280	4.613%	353,732	32.73%	6,157,290	251	5,714	24,531
SIG	SIG	6.940	7.060	6.830	7.060	744,117	0.120	1.723%	544,910	273.54%	3,793,348	160	4,651	23,708
AXA	AXA	2.620	2.650	2.610	2.620	4,901,371	0.010	0.383%	1,750,099	55.54%	10,833,694	168	29,175	64,486
ANZ	ANZ	18.06	18.37	18.03	18.33	6,662,917	0.270	1.495%	2,684,872	67.49%	89,016,720	1,636	4,073	54,411
MTT	MTT	2.230	2.260	2.230	2.250	1,146,441	0.020	0.897%	-349,975	-23.39%	2,144,359	125	9,172	17,155
BLD	BLD	5.190	5.340	5.190	5.340	2,006,462	0.150	2.890%	445,592	28.55%	9,423,030	390	5,145	24,162
BSL	BSL	4.810	4.930	4.780	4.930	3,722,816	0.190	4.008%	-2,797,494	-42.90%	16,023,428	622	5,985	25,761

As shown in the above figure, all you need to do is types the stock code in a cell of the first column titled 'Code', hit ENTER and the information in the rest of the row is updated automatically.

You can re-size each column or row if the information does not fit in a cell. To re-size a column, point to the title row of the spreadsheet. When the cursor changes to a horizontal two-side arrow, drag the cursor and you will see the column size changes.

Similarly, to resize a row, point the title column of the spreadsheet. When the cursor changes to a vertical two-size arrow, drag the cursor and you will see the row size changes.

Watch Pages

Watch Page and Portfolio

In the watch page spreadsheet, you can also add a new row, insert or delete a row. To insert a row, first left click the row that you want to insert before. Then right click to bring up the popup menu and select the Insert Row command.

Similarly, to delete a row, first left click the row that you want to delete. Then right click to bring up the popup menu and select the Delete Row command.

You can save the current watch page, or save the current watch page to a different file name. In this way, you can create as many watch pages as you wish. To do this, simply right click on any portion of the spreadsheet and select Open, Save and Save As commands from the popup menu. Alternatively, you can select these commands from the main menu.

All watch page files are mandated with a file extension ".swh". If you save your watch page using a different extension, ShareChart will change your extension to ".swh". If you save your watch page without an extension, ShareChart will append the extension ".swh". If you select 'New' menu item from the popup menu, all the current contents in the watch page will be cleared to allow you to create a new watch page. Make sure that you save your current watch page before you select the new command.


ShareChart also provides the Options Watch page for options traders. The operating of the Options Watch page is the same as the Stock Watch with the only difference being the columns and their calculations. The column titles are self-explanatory.

Sharechart

8.2 PORTFOLIOS

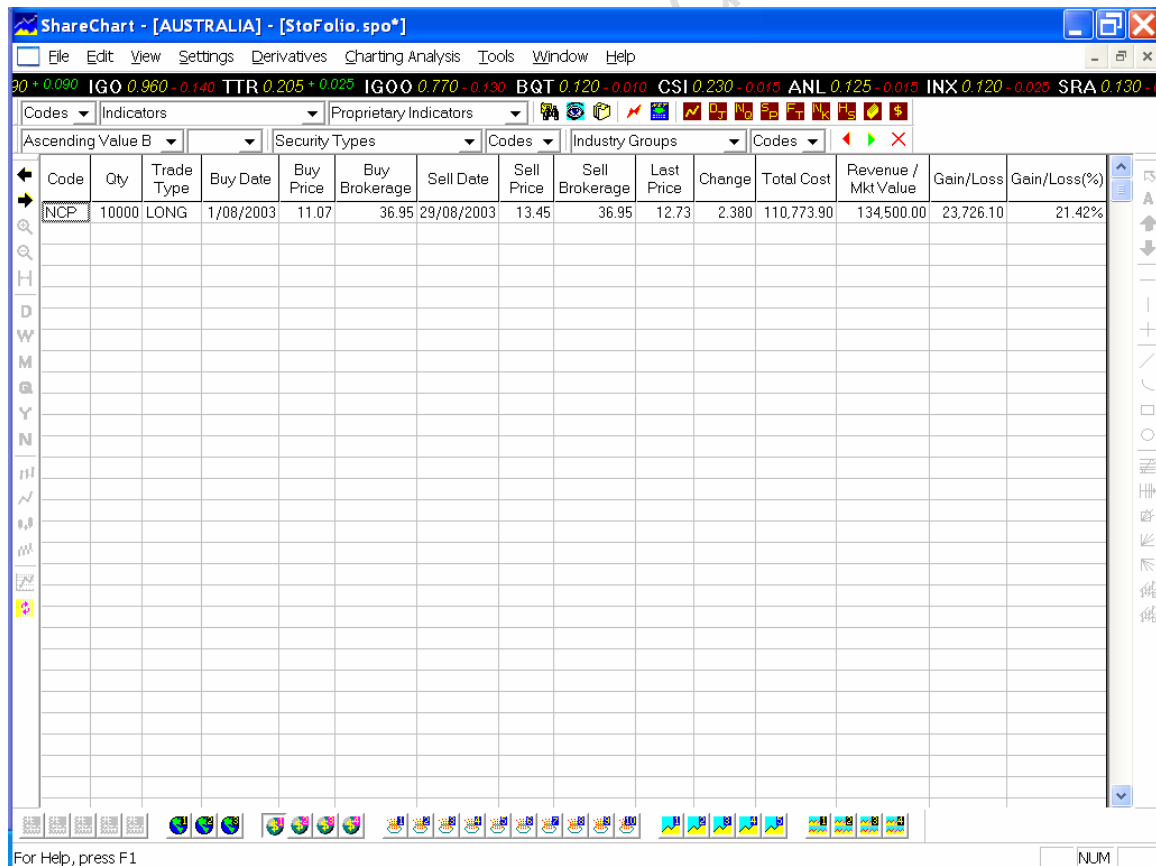
Portfolio is a money management tool that allows you to monitor the performance of your holdings. It operates in a similar way to the Stock Watch page except for the following.

- You will need to enter information to more cells: Code, Qty, Trade Type, Buy Date, Buy Price, Buy Brokerage, Sell Date, Sell Price, and Sell Brokerage. You will see that the rest of the information in the row changes if you change any of the entered cells.
- The file extension for portfolio is ".spo". Similar to the watch page, ShareChart mandates the file extension ".spo" to the portfolio. You can create as many portfolios as you wish.

To open the portfolio, click on the Portfolio icon  on the Selection Bar, or select File < Open Portfolio and select either Stock Portfolio or Option Portfolio.



The following screen will appear for Stock Portfolio:



Similar to Stock Watch page, you can resize each column or row if the information does not fit in a cell. You can add or delete rows as well. You can save the current portfolio, or save the current portfolio to a different file name. In this way, you can create as many

Portfolio

Watch Page and Portfolio

portfolios as you wish. To do this, simply right click on any portion of the spreadsheet and select the standard Open, Save and Save As commands from the popup menu.

Alternatively, you can select these commands from the main menu. All portfolio files are mandated with a file extension ".spo". If you save your portfolio using a different extension, ShareChart will change your extension to ".spo". If you save your portfolio without an extension, ShareChart will append the extension ".spo".

If you select 'New' menu item from the popup menu, all the current contents in the portfolio will be cleared to allow you to create a new portfolio. Make sure that you save your current portfolio before you select the new command.

ShareChart also provides the Options Portfolio page for options traders. The operating of the Options Portfolio page is the same as the Stock Portfolio with the only difference being the columns and their calculations. The column titles are self-explanatory.

For CFD traders, ShareChart provides CFD portfolio that will allow CFD traders to manage their CFD trading. The following screen is an example of CFD portfolio.

The screenshot shows the ShareChart software interface with a CFD portfolio. The window title is "ShareChart - [AUSTRALIA] - [Seismo Example CFD Portfolio.cpo*]". The menu bar includes File, Edit, View, Settings, Derivatives, Charting Analysis, Tools, Window, and Help. Below the menu bar are several dropdown menus for Codes, Indicators, Proprietary Indicators, Charting Analyzed List, Security Types, Codes, Industry Groups, and Codes. The main area is a table with the following columns: Code, Trade Type, Qty, Entry Date, Entry Price, Exit Date, Exit/Last Price, Margin %, Initial Outlay, Days Held, Margin Required, Entry Face Value, Exit/Last Face Value, Gross P/L, and Co. The table contains 20 rows of data for various CFDs, including BHP, HDR, RIO, RCL, WPL, ARQ, CSR, FGL, ALL, SBC, AMC, OXR, BIL, WOR, MGW, AXA, TPI, TEL, IAG, WBC, BSL, PBG, and CFX. A TOTAL row is at the bottom. The status bar at the bottom says "For Help, press F1".

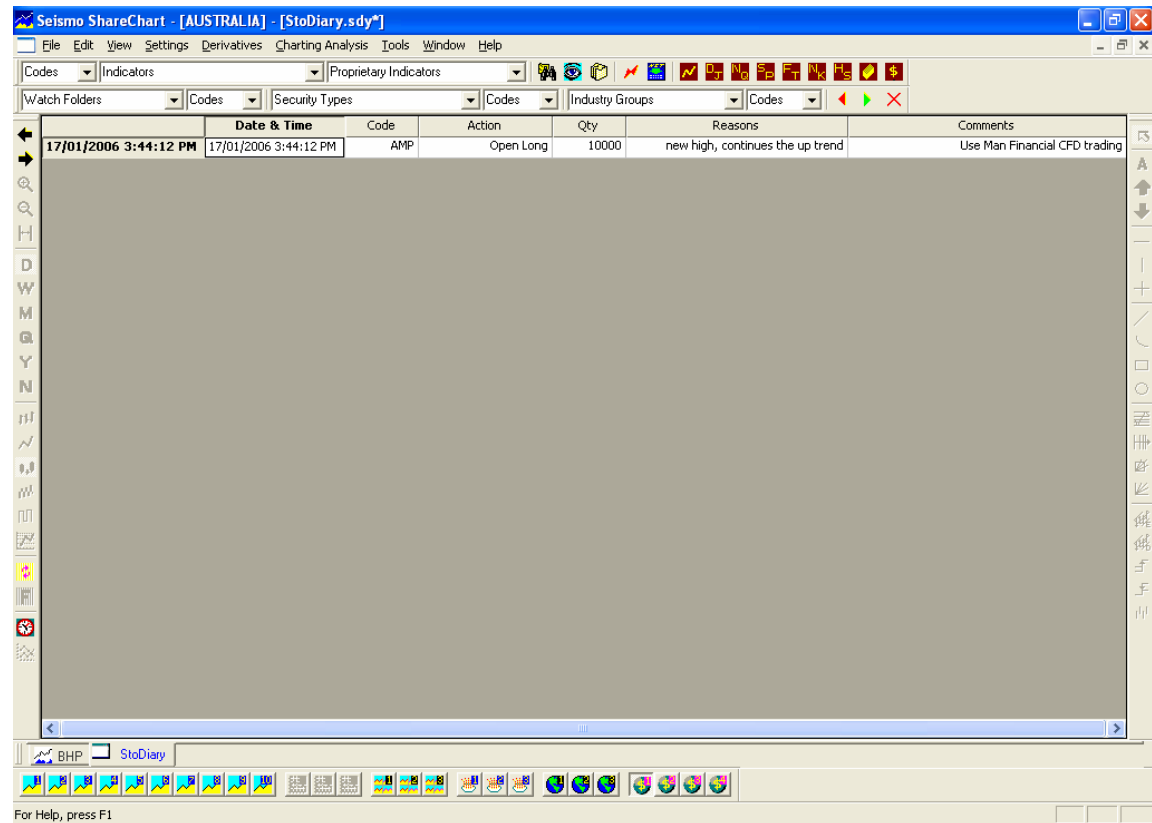
	Code	Trade Type	Qty	Entry Date	Entry Price	Exit Date	Exit/Last Price	Margin %	Initial Outlay	Days Held	Margin Required	Entry Face Value	Exit/Last Face Value	Gross P/L	Co
BHP	BHP	LONG	2982	11-Sep-06	26.13		38.28	5.00	3,895.98	316	5,707.55	77,919.66	114,150.96	36,231.30	
HDR	HDR	SHORT	19000	07-Sep-06	1.3563	12-Sep-06	1.19		3,865.45	6		25,769.70	22,610.00	3,159.70	
RIO	RIO	SHORT	1100	11-Sep-06	71.11	12-Sep-06	68.12		3,911.05	2		78,221.00	74,932.00	3,289.00	
RCL	RCL	LONG	16700	29-Aug-06	1.17	06-Sep-06	1.34		3,907.80	9		19,539.00	22,378.00	2,839.00	
WPL	WPL	SHORT	990	11-Sep-06	38.54	12-Sep-06	35.97		3,815.46	2		38,154.60	35,610.30	2,544.30	
ARQ	ARQ	SHORT	13000	07-Sep-06	1.455		1.59	20.00	3,783.00	320	4,134.00	18,915.00	20,670.00	-1,755.00	
CSR	CSR	SHORT	13000	07-Sep-06	2.95	12-Sep-06	2.81		3,835.00	6		38,350.00	36,530.00	1,820.00	
FGL	FGL	LONG	12000	15-Sep-06	6.62	15-Sep-06	6.77		3,972.00	1		79,440.00	81,240.00	1,800.00	
ALL	ALL	LONG	2900	21-Sep-06	13.61	26-Sep-06	14.15		3,946.90	6		39,469.00	41,035.00	1,566.00	
SBC	SBC	LONG	2200	07-Sep-06	12.10		17.3	15.00	3,993.00	320	5,709.00	26,620.00	38,060.00	11,440.00	
AMC	AMC	LONG	5600	20-Sep-06	7.06	21-Sep-06	7.25		3,953.60	2		39,536.00	40,600.00	1,064.00	
OXR	OXR	LONG	13000	05-Sep-06	3.03	06-Sep-06	3.10		3,939.00	2		39,390.00	40,300.00	910.00	
BIL	BIL	LONG	3300	13-Sep-06	12.08	14-Sep-06	12.34		3,986.40	2		39,864.00	40,722.00	858.00	
WOR	WOR	LONG	2400	27-Sep-06	16.60	28-Sep-06	16.95		3,984.00	2		39,840.00	40,680.00	840.00	
MGW	MGW	LONG	8900	15-Sep-06	2.23	22-Sep-06	2.32		3,969.40	8		19,847.00	20,648.00	801.00	
AXA	AXA	SHORT	6400	20-Sep-06	6.10		7.77	10.00	3,904.00	307	4,972.80	39,040.00	49,728.00	-10,688.00	
TPI	TPI	LONG	2700	20-Sep-06	7.30	21-Sep-06	7.16		3,942.00	2		19,710.00	19,332.00	-378.00	
TEL	TEL	LONG	11000	31-Aug-06	3.61	06-Sep-06	3.58		3,971.00	7		39,710.00	39,380.00	-330.00	
IAG	IAG	LONG	7300	13-Sep-06	5.37	14-Sep-06	5.32		3,920.10	2		39,201.00	38,836.00	-365.00	
WBC	WBC	SHORT	3400	15-Sep-06	22.77	18-Sep-06	22.879		3,870.90	4		77,418.00	77,788.60	-370.60	
BSL	BSL	LONG	5633	07-Sep-06	7.02	11-Sep-06	6.94		3,954.37	5		39,543.66	39,093.02	-450.64	
PBG	PBG	SHORT	10000	20-Sep-06	2.48	21-Sep-06	2.53		3,645.00	2		24,800.00	25,300.00	-500.00	
CFX	CFX	SHORT	20000	24-Aug-06	1.87	04-Sep-06	1.905		3,740.00	12		37,400.00	38,100.00	-700.00	
TOTAL									89,705.41		20,523.35	937,697.62	997,723.88	53,625.06	

In the CFD portfolio, if you have not exited the position, you can leave Exit Date blank. The portfolio manager will calculate profit or loss based on the last price. It will also show the margin rate and calculate the margin required for holding your trading position. If the position is closed, the margin related columns will not show any values because no margin is required since the position is closed. Adjustment column is provided in CFD portfolio to allow traders to record any additional income or cost, such as dividends or capital returns.

8.3 TRADING DIARY

Trading diary allows you to make note on stocks that is under your interest. With Trading Diary, you can make notes on actions, reason for actions, and comments on stocks.

To open the portfolio, select File < Open Trading Diary. The following screen will appear for Trading Diary:



Similar to Stock Watch page, you can resize each column or row if the information does not fit in a cell. You can add or delete rows as well. You can save the current trading diary, or save the current trading diary to a different file name. Therefore, you can create as many trading diaries as you wish. To do this, simply right click on any portion of the spreadsheet and select the standard Open, Save and Save As commands from the popup menu.

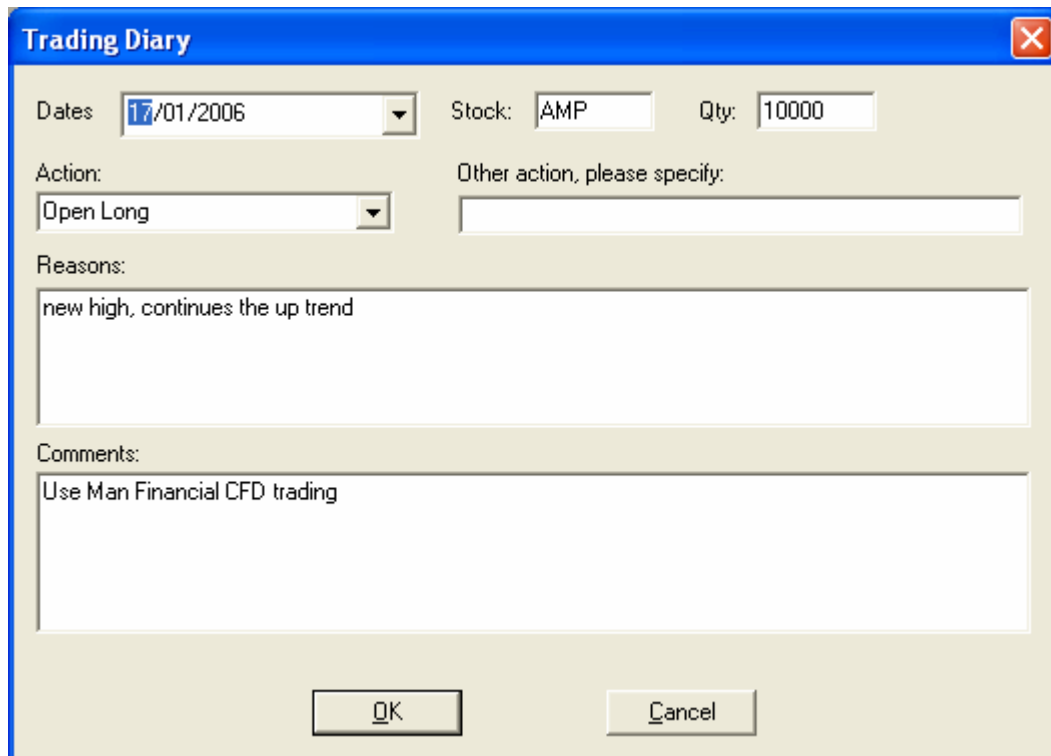
All trading diary files are mandated with a file extension ".sdy". If you save your trading diary using a different extension, ShareChart will change your extension to ".sdy". If you save your trading diary without an extension, ShareChart will append the extension ".sdy".

If you select 'New' menu item from the popup menu, all the current contents in the trading diary will be cleared to allow you to create a new trading diary. Make sure that you save your current trading diary before you select the "New" command.

If you select Add or Edit command from the popup menu, the following dialog box will appear.

Trading Diary

Watch Page and Portfolio



The image shows a 'Trading Diary' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains several input fields and text areas:

- Dates:** A dropdown menu showing '17/01/2006'.
- Stock:** A text box containing 'AMP'.
- Qty:** A text box containing '10000'.
- Action:** A dropdown menu showing 'Open Long'.
- Other action, please specify:** An empty text box.
- Reasons:** A text area containing 'new high, continues the up trend'.
- Comments:** A text area containing 'Use Man Financial CFD trading'.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

From the above Trading Diary dialog box, you can edit to update an existing trading diary record or add a record. The "Action" dropdown box list all predefined trading actions. If you want add, edit, or delete the predefined trading action, you can open the text file "TradingDiaryActions.txt" using any text editor. You can, of course, edit your trading diary directly in the Trading Diary spreadsheet.

CHAPTER 9 CUSTOMIZING SHARECHART

9.1 OVERVIEW

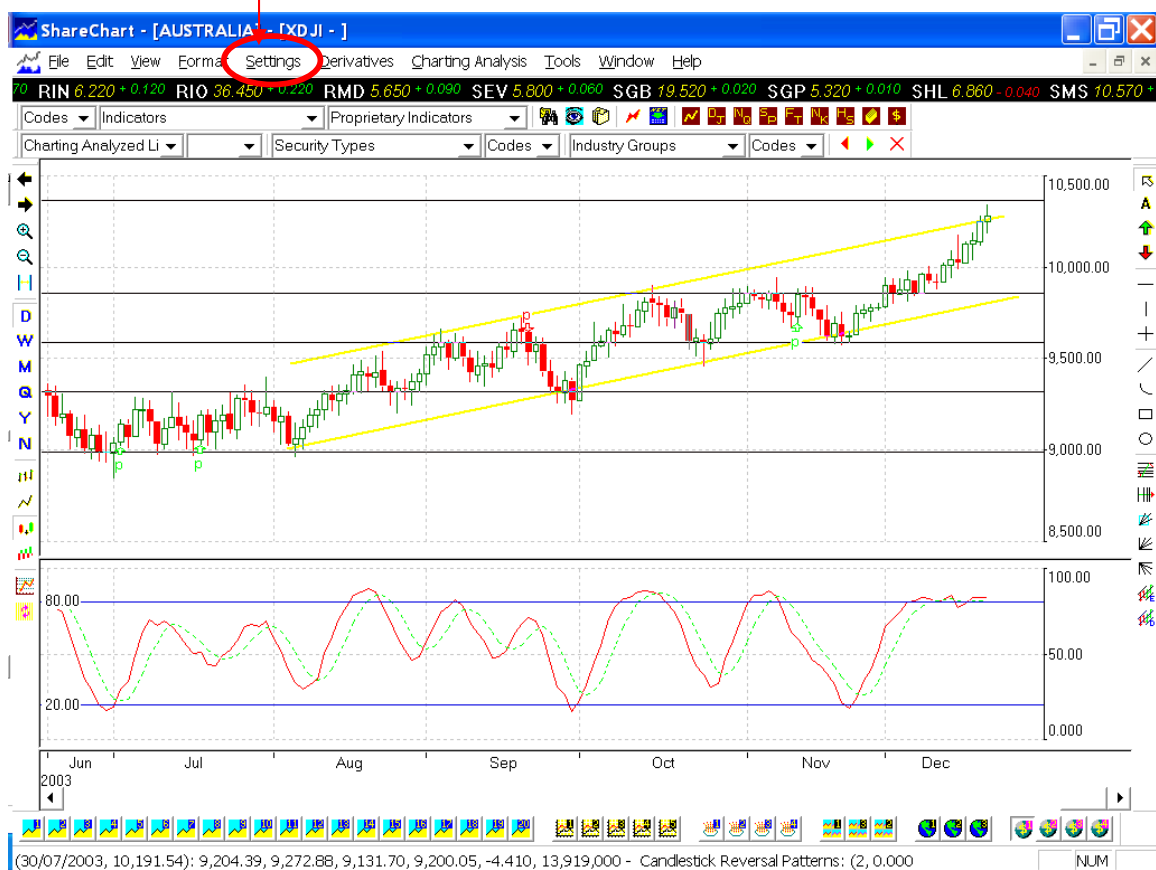
You can customize ShareChart to suit your own preferences. The customizations are mostly in the Settings menu.

There are three categories of settings:

- General settings,
- Chart settings,
- Indicators

The general settings are settings for the ShareChart working environments. Chart settings and indicators are settings for individual charts, but can be set for all charts as well when saved as a template.

The Settings are located at the top of screen:



9.2 GENERAL SETTINGS

General Settings apply to the ShareChart entire workspace, regardless of which charts you are working on. The general settings will be saved when you exit ShareChart. When you select Settings < General Settings the following dialog box will appear.

General Settings

Data Directory: (Default stock on startup:)

Hours Behind Us: ☒ Link My Holding Folder with current Portfolio

☒ Keep group selection on exit

Default Template: ☒ Always use default template

Settings for Top Stocks

Number of sorted top stocks: Price: - ☐ Include Indices

Volume: - Value: -

Ticker Speed

Ticker Step

☒ Alert ☐ Automimize alert view when opening a chart from alert view

☒ Automatic data archive every days ☒ Automatic settings backup every days

Number of stocks per option contract: ☐ Check news periodically every minutes

Data Directory: The location of the Data Directory is where the stock data comes from. You can select a different data directory to work with by typing the path name. Or you can use the Browse button to browse the file directory on your hard disk and select your desired directory. Data directory is also used to switch between different markets. For example, you can type in "AUSTRALIA" to switch to the Australia market.

Hours Behind Us: The time difference between our local time and the time for the market. This option is normally for real time data.

Link My Holding Folder and current portfolio: Ticking this box will allow you to link your current portfolio with the My Holding folder. If there is a change in portfolio, the change will go to My Holding folder when you save or open the current portfolio.

Keep group selection on exit: Ticking this box will allow you to keep the last selection on the selection bar when you exit ShareChart. When you open ShareChart again, the last selection will be restored. For example, if you select My Holding from Watch Folders drop down box and reopen ShareChart, My Holdings will be re-selected.

Default Template: The Default template is used to load default settings for a chart. If a chart has not been opened, ShareChart will load the settings in the default template. If the default template is not found or the template is not specified in the Default Template field, ShareChart will use its own default settings. If "Always use default template" is

General Settings

Customizing ShareChart

checked, ShareChart will always use the settings in the default template when opening a chart regardless of whether the chart has been opened or not. In other words, ShareChart will not use the settings that were saved for the chart.

Default Stock on Startup: The stock to load when you open ShareChart. For USA market, the default is \$DJI, which is the Dow Jones Industrial Average Index. You can enter a different stock code to start with or simply leave it blank if you do not want to load any stock when ShareChart starts.

Settings for Top Stocks: These settings outline how to select stocks in the Selected Stock Code box. You can set the number of top stocks in the Selected Stock Code box by entering in 'Number of sorted top stocks' field. To limit the volume and price ranges for selecting stocks, enter the volume and price fields. If you enter zero (0) in the upper end of the range, ShareChart treats that there is no upper limit. For example, if you enter 10000 and 0 in the volume field, ShareChart will select stocks with volume greater than or equal to 10000 in the Selected Stock Code box.

Ticker Speed: This sets the speed of stocks scrolling in the Stock Ticker bar.

Ticker Step: This sets the moving step of stocks scrolling in the Stock Ticker bar.

Alert: When this box is checked, ShareChart will prompt an alert message when price values go below or above your specified criteria in the Set Alert dialog box. If "Automimize alert view when opening a chart from alert view" is ticked, the alert view will be minimized when you double click on an alert to open its underlying chart.

Check news every [15] minutes: Allows you to check Sharechart news at a desired time interval automatically. The default is 15 minutes. You can change it to your desired time interval.

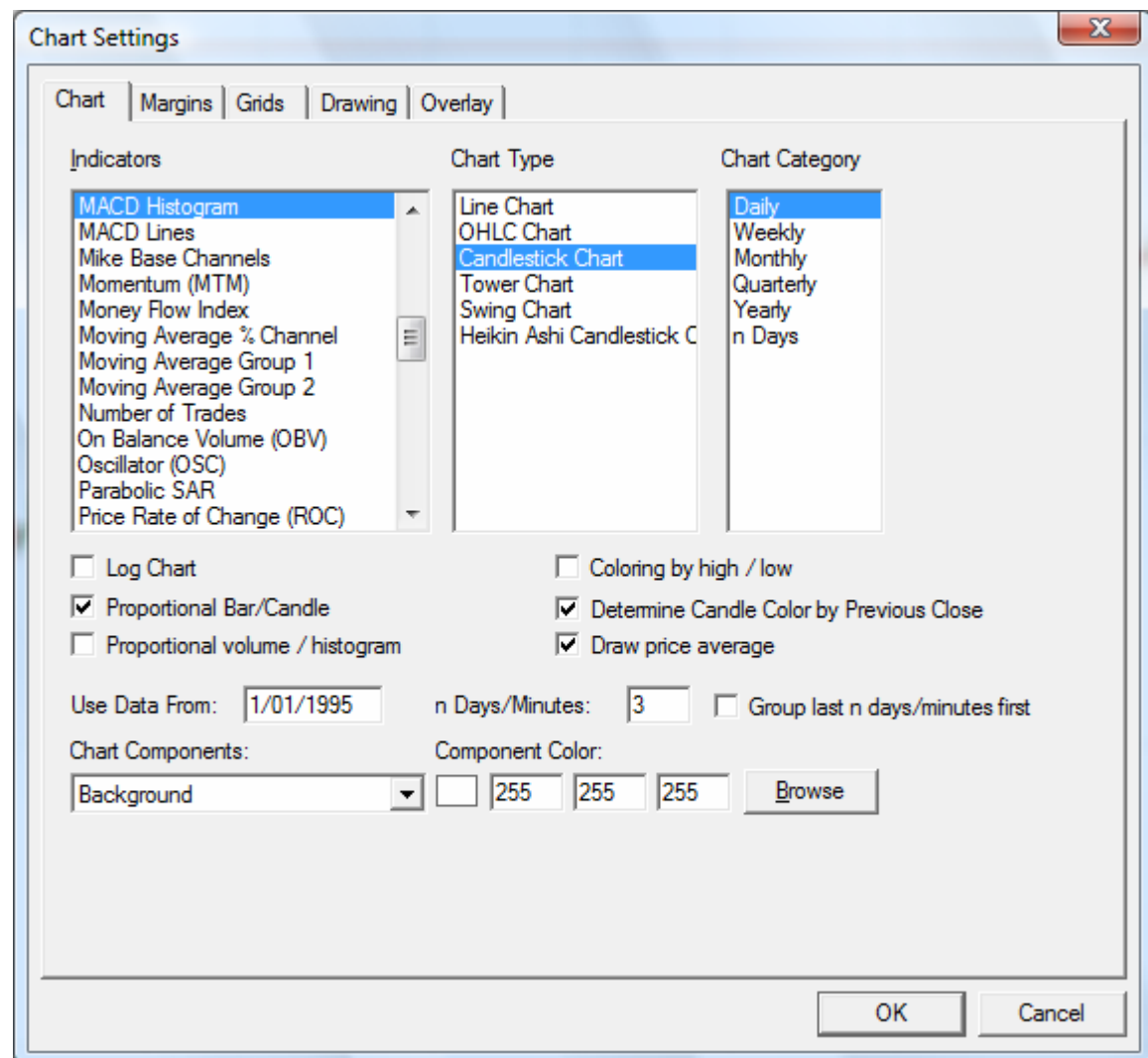
Automatically Archive Data every [14] Day's: Will archive your data at the desired time interval. The default is 14 days. You can change it to your desired time interval.

When you finish with General Settings, click on OK. The general settings will take immediate effect for the changed settings. For example, if you select a different data directory or market, the Stock Code dropdown box will be filled with stock codes for that directory or market. The number of stocks in the Selected Stock Code dropdown box will be adjusted according to the number in the 'Number of sorted top stocks' field.

9.3 CHART SETTINGS

Chart Settings sets the settings for an individual chart. The chart settings will be saved for the stock when you close the chart window for the stock. When you reopen the chart for the stock, all chart settings will be reloaded automatically.

The Chart Settings dialog box can be accessed through Settings < Chart Settings.



9.3.1 Chart Settings

When the dialog box is open, all current selections will be defaulted to their corresponding dropdown boxes.

You can customize the colors for different attributes of a chart:

- Background
- Chart
- Text
- Up
- Down
- Outside
- Inside

The default colors for these attributes are white, black, black, green, red, dark blue and black respectively. To change the colors, select an attribute from the Color dropdown box, and click on the Browse button to navigate through the colors.

"Use Data From" field allows you to open the chart from the date you specify. This is useful when you want to see the chart for only recent years.

"Up / Down coloring" this tick box allows you to color each price bar on your bar charts or candlestick charts purely based on the comparison between previous high and low and the current high and low.

"Inside/Outside coloring" this tick box allows you to color each price bar on your bar charts or candlestick charts purely based on if the price bar is an inside or outside day.

"n Days/Minutes" field sets a specific number of 'n' periods for the N-day chart. When Group last n days / minutes first is ticked, you instruct ShareChart to group prices from the last n price bars instead of from the beginning of the chart.

When **"Proportional Bar/Candle"** is checked, the bar chart or candlestick chart width will change according to the density of bars when you zoom in or zoom out of the chart. Hollow Up Candle and Hollow Down Candle options are used to draw hollow candle bars.

When **"Proportional Volume/Histogram"** is checked, the volume or histogram indicator width will change according to the density of bars when you zoom in or zoom out of the chart.

When **"Determine candle color by previous close"** is checked, the candle color is determined by comparing the closing price with the previous closing price, i.e. up color if close is higher than the previous close and down color if the close is lower than the previous close. If "Determine candle color by previous close" is not checked, then the candle color is determined by comparing open and close, i.e. up color if close is higher than open and down color if close is lower than open.

9.3.2 Margins

The Margins page sets margins and other related settings for an individual chart.

Chart Settings

The screenshot shows the 'Chart Settings' dialog box with the 'Margins' tab selected. The dialog has five tabs: 'Chart', 'Margins', 'Grids', 'Drawing', and 'Overlay'. The 'Margins' tab contains the following settings:

Setting	Value
Left Margin (%)	0
Top Margin (%)	4
Bottom Margin (%)	4
Right Margin (%)	0
X Xis Width (%)	5
Y Xis Width (%)	8
Extended X Blanks	10
Extended Y Blanks	50
Scroll Units	1
Units per Price	5

Below the input fields are several checkboxes:

- ☐ Border for the charts
- ☒ Show chart/indicator title
- ☒ Apply dilution on chart
- ☒ Show Demand/Supply
- ☒ Expand charts to window
- ☒ Round Y Xis Scales
- ☒ Copyright text when copy charts
- ☒ Apply settings to all chart categories

At the bottom, there is a 'Size for copying chart' section with a dropdown menu set to 'Custom', input fields for '600' and '380' pixels, and radio buttons for 'Portrait' (selected) and 'Landscape'. 'OK' and 'Cancel' buttons are at the bottom right.

Left, right, top, and bottom margins for the current stock chart are in percent. Therefore, you must enter a value between 0 and 100, which is a percentage of the whole dimension. For example, if you enter 'Top Margin' as 10, you specify that the top margin is 10% of the height of the chart window.

"X and Y Xis widths" are also in percentage. They are used to define the width of the date axis and the width of the price and volume axes.

"Extended X Blanks" are the number of blanks (in points) at the end of the chart. This allows you to extend dates for your price prediction or drawing at the last stock price.

"Extended Y Blanks" are the number of blanks (in points) above the maximum price of the current chart window. This allows you to extend your rising price projection vertically.

"Scroll Units" are the number of stocks that you want to scroll when you click on the scroll buttons on the scroll bar.

"Border for the charts" - If you want a border on you chart and indicators, check this box.

"Show chart/indicator title" - You can turn on/off chart titles for both chart and indicators.

"Expand charts to window" - If this box is checked, the chart will expand to the current window to the highest and lowest prices of stocks in the current window, regardless of

Chart Settings

Customizing ShareChart

the historical highs and lows. If you uncheck this box, ShareChart will draw the chart with scales in relative to historical highs and lows. In most cases, checking 'Expand charts to window' is very useful because if you draw charts in respective to the historical highs and lows, you would not see much of the price fluctuation in the current window.

"Round Y Xis scale" - If this box is checked, the scale on the Y- axis is rounded to numbers that are incremented in multiples of 10s or 5s. If it is unchecked, the Y- axis will be scaled using the maximum and minimum values of charts and/or indicators.

"Apply dilution on chart" - If this box is checked, the chart will be adjusted for dilution factor set by the dilution editor. The dilution editor will automatically set the "Apply dilution on chart" field of this dialog box to be checked. See Section 4.5 Stock *Dilution Editor* for details.

"Copyright text when copying chart" - If this box is checked, Sharechart copyright text will be attached to the bottom of your copied or printed chart.

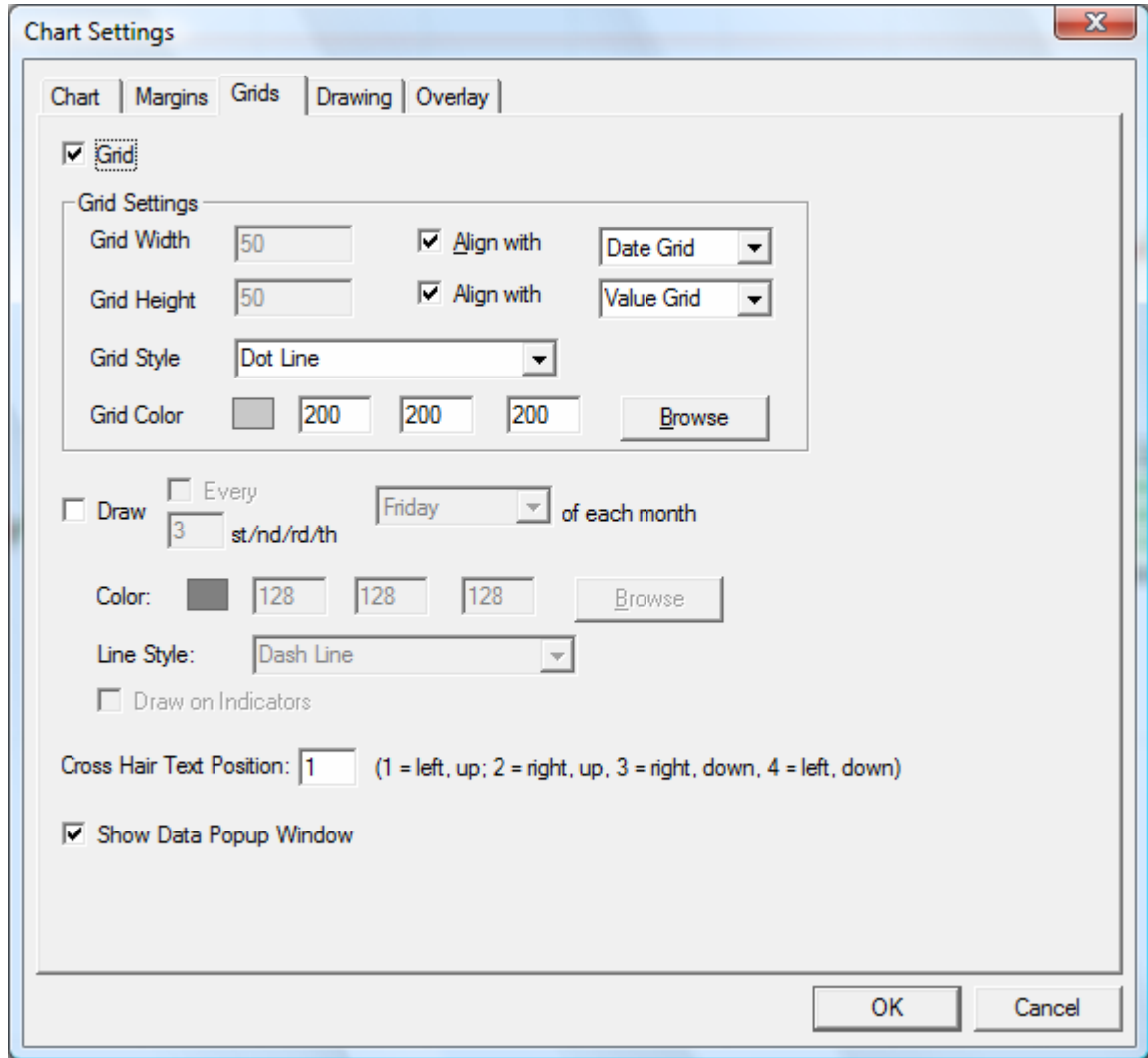
"Apply settings to all chart categories" - lets you to apply the chart settings including indicator settings for a chart category to all other chart categories. For example, you might want to apply settings for daily chart to all other chart categories such as weekly charts, monthly charts, and etc. Without checking this option, you will need to set chart settings including indicator settings independently for each chart category.

"Size of copying chart" - will allow you to specify your desired size for copying chart to clipboard and then paste it to your favorite applications.

9.3.3 Grids

The Grids page sets grids and related settings for an individual chart.

Chart Settings



If you check the Grid check box, the fields in the Grid Settings will be enabled. You can enter the grid width, height, style, and even color of the grid. You can click the Browse button to browse colors and select an appropriate color. If you uncheck the Grid check box, the fields in the Grid Settings will be disabled.

“Align with” check box allows you to align vertical grid lines to the day of week under your selection. When you check the Align with check box, the Grid Width field will be disabled, while Day type dropdown box will be enabled where you can select a day of the week. In contrast, if you uncheck the Align with check box, the Grid Width field will be enabled while the Day type dropdown box is disabled.

“Show Data Popup Window” check box will allow you to show the data popup window when the cursor is still for one second in the chart window. The data popup window will show price information along with indicator values. You can also turn on/off the data popup window by right clicking on the chart and selecting “Data Popup Window” from the menu.

“Draw Day of Month” This check box will allow you to draw day of month as a vertical line with date information. For example, you may want to draw every third Friday of each month to show the US option expiry dates. If you want to show every day of a month, tick “Every” check box. For example, you may want to show every Monday of each month. If you want draw vertical day line on indicators, tick “Draw on Indicators” check box. The following chart illustrates the “Day of Month” feature.



If you want to turn on / off the "Day of Month" feature, simply right click on the chart and select "Day of Month" from the popup menu.

9.3.4 Drawing

To change the line style and color for a drawing object, select a drawing object from the Drawing Object dropdown box. Its Line Style dropdown box and color will default to their current value. Select a line style from the Line Style dropdown box and use the color browser to select the color.

Drawing objects that can be set with drawing styles are:

- Text
- Up Arrow
- Down Arrow
- Horizontal Line
- Vertical Line
- Line
- Rectangle
- Circle
- Arc
- Fibonacci Cycle
- Support/Resistance
- Speed Resistance
- Gan Fan
- Standard Error Channel
- Standard Deviation Channel
- Price Extension
- Price Retracement
- Price Cycle

Chart Settings

If you tick **"Drawing style"** for all drawing objects, you elect not to set drawing style for each drawing object. Rather you want to use the global drawing style for all drawing objects and use Format Bar for your easy setting attributes for drawing objects. See 5.4 Format Bar for details.

If the **"Extend Trend Line"** check box is checked, the drawn trend lines on the charts will be extended to the whole chart.

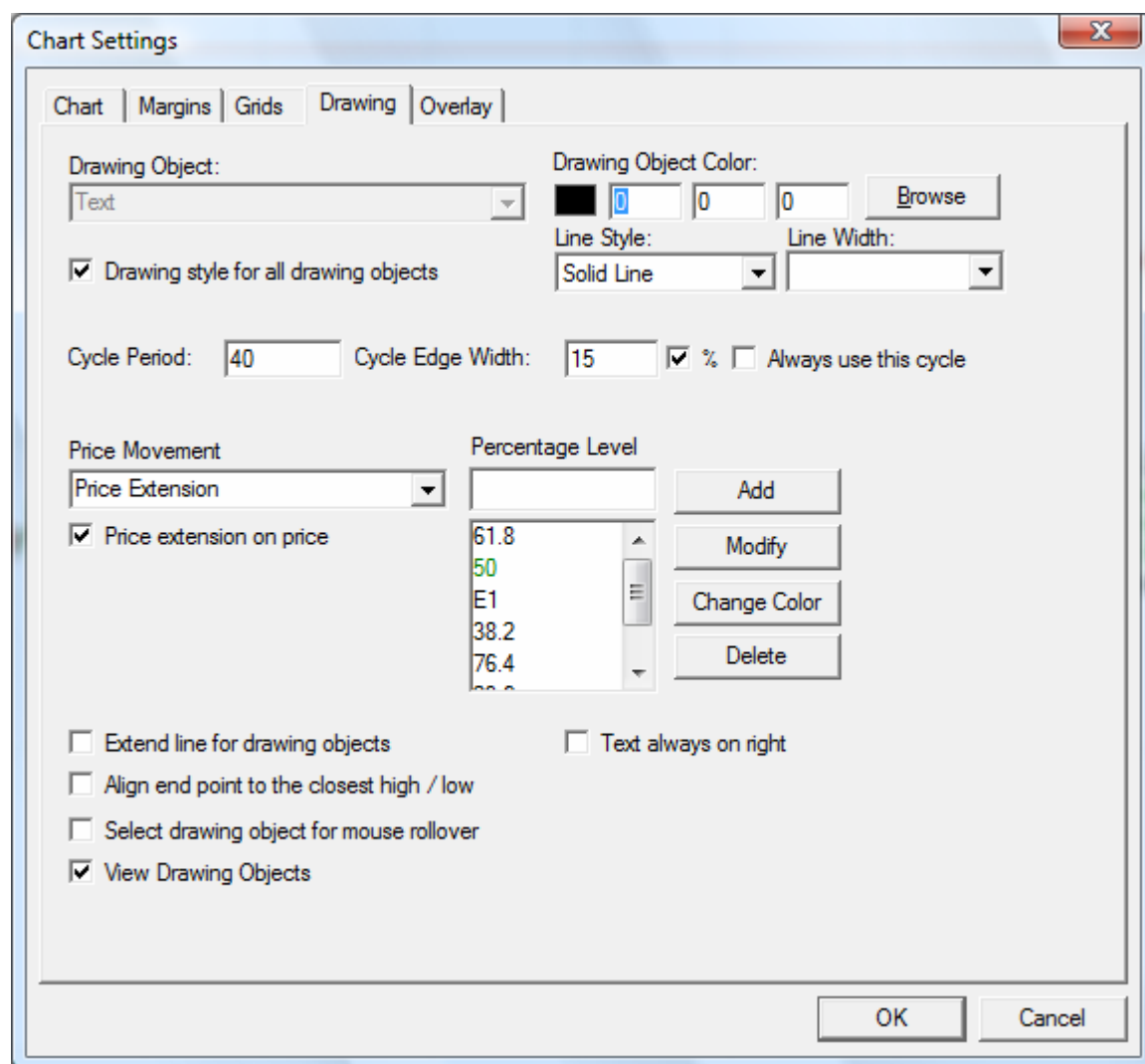
If the **"Align drawing objects to the closest high/low"** check box is selected, then when you draw a drawing object and release the left button, the end points will align to the high or low of the current highlighted price bar, depending on which end of the price bar is closer to the cursor.

If the **"Extend line for drawing objects"** check box is checked, the drawn trend lines on the charts will be extended to the whole chart.

If the **"Select drawing object for mouse rollover"** check box is checked, as you roll your mouse over the graph it will highlight the closest drawing object.

If the **"View Drawing Object"** check box is checked, it will display your drawings. Likewise, if it is unchecked it will hide your drawings.

Price movement is used to set initial attributes for drawing price extension or price retracement. When you draw a price extension or price retracement object, the initial settings will apply. You can always later alter the settings as described in Section 5.2 Drawing Properties.



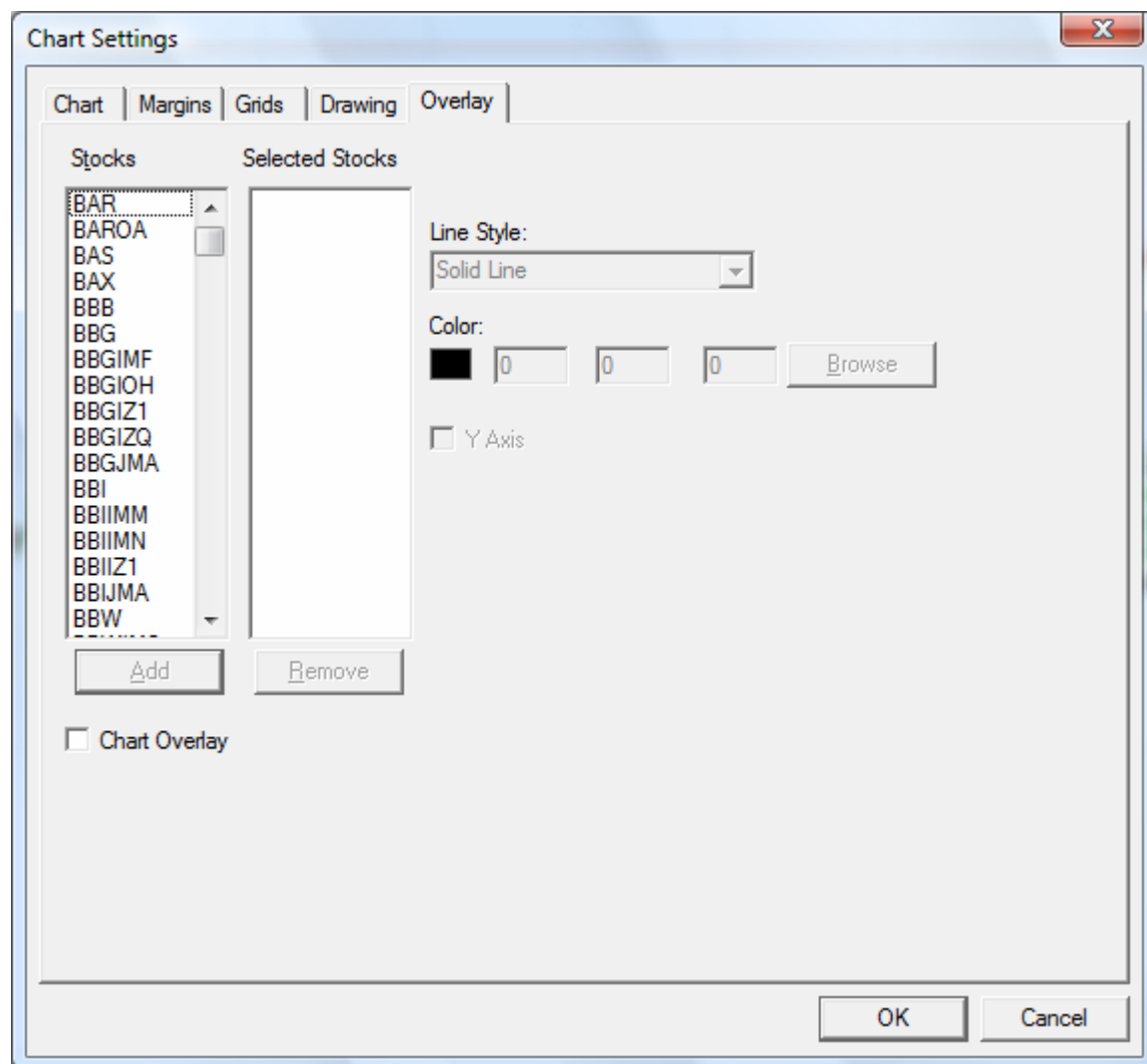
To set the initial settings for price movement, select a price movement object from the "Price Movement" dropdown box. The percentage level list box will be filled the default percentages. You can add, modify or delete percentage levels. To add a percentage, type percentage in the percentage edit box, and click Add button. The added percentage will be assigned with a default color. You can use "Change Color" button to change the selected percentage.

You can also set initial cycle period, cycle edge width for drawing a cycle. When "Always use this cycle" is checked, the cycle period in the "Cycle Period" field will always apply without calculating average cycle from up arrows drawn on the chart. For more details, please see in Section 5.3.3 Price Cycle.

9.3.5 Chart Overlay

ShareChart allows you to overlay charts on an existing chart. To overlay charts on an open chart, select Settings < Chart Settings < Chart Overlay. The following dialog box will appear.

Chart Settings



In the Chart Overlay page, select the stocks in the “Stocks” list box that you want to add and click “Add” button to add the selected stocks to the “Selected Stocks” list box. You can select multiple stocks by holding CTRL or SHIFT key.

To change the line style or color of the selected stocks, select a stock in “Selected Stocks” list box, the corresponding fields on the right will be filled with the parameters associated with the selected stock, where you can make changes. If you want to plot Y axis for the selected stock, tick “Y Axis” check box.

Once you have selected overlay stocks and set appropriate parameters, you can tick “Chart Overlay” check box, and click “OK” button. The current chart will be overlaid with the selected stocks, as shown in the following example.

Chart Settings

Customizing ShareChart



You can turn the overlay on / off by right clicking on the chart and selecting "Chart Overlay" from the popup menu.

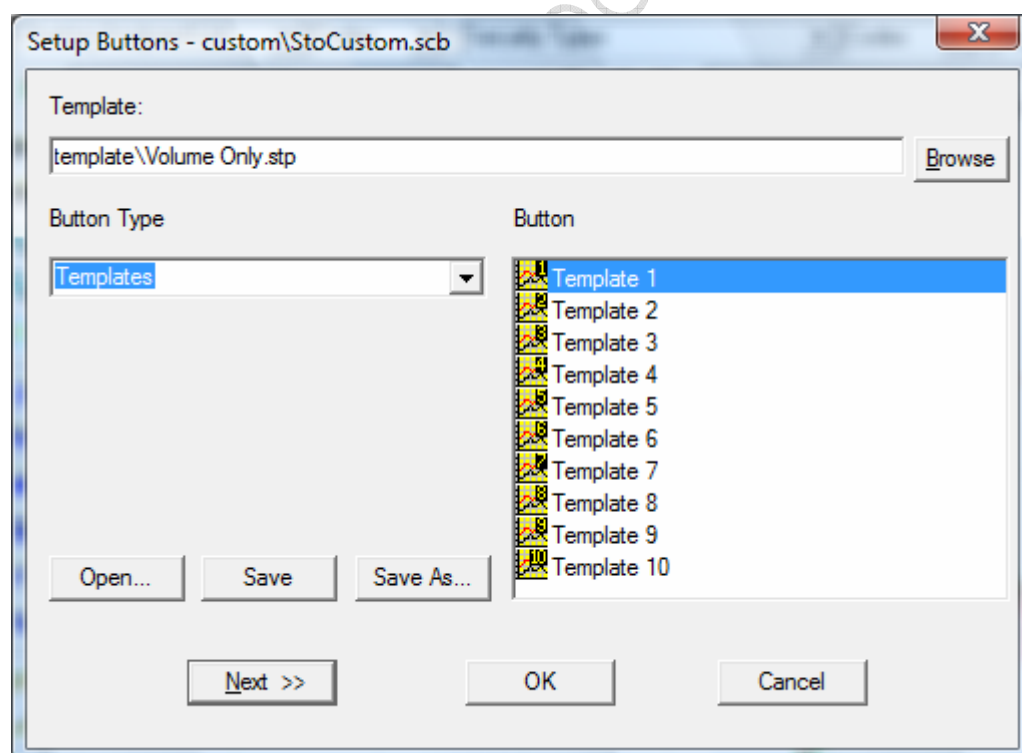
9.4 SETTING CUSTOMIZED TEMPLATES

Templates can be used to customize ShareChart for your own individual preferences. You can change any of the settings on the chart that you like. For example you can change chart colors, indicators properties and save the changed settings to a template. You can always open the saved template to the current chart. This will save you considerable time for setting each chart.

To set up a template, you need to open a chart first. You can then set up all settings including general settings, chart settings, and indicator settings to the chart. Once you are satisfied with your settings you need to save it to a template, so that you can view the template whenever you use ShareChart. To save a template, go to File < Save Template and save the template to the ShareChart folder and within the appropriate Template folder. For example, if you have developed a template for the Australian Market you need to save it to the Australian Templates folder within the Australian folder which itself is within the main ShareChart folder.

To apply the saved template to an open chart, simply select File < Open Template, and select the saved template. Alternatively, you can assign the saved template to one of the template buttons on the Customizable Bar so that it can be easily invoked by just a click of template button. To assign a template to a Template button, go to Tools < Set Up Customizable Bar, in the 'Button Type' drop down box select 'Templates' then browse to find the template that you just named and saved, select it and open it.

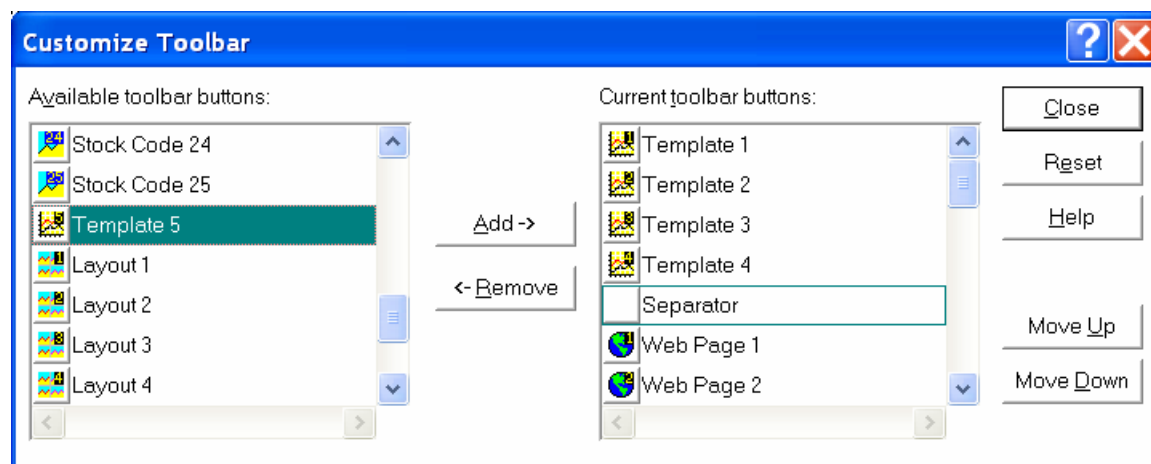
There are ten available template buttons to use for templates, so select an available button that you would like this template to be on then click 'next'.



Within this next page click on the template button you just allocated your template to within the 'Available toolbar buttons' box and hit 'Add' this will place the button onto the bottom toolbar of ShareChart.

Setting Templates

Now highlight the button within the 'Current toolbar buttons' box and move it to the desired position by using the 'move up' and 'move down' buttons. Once it is in the correct position close this page.



You can now view this template whenever you like by clicking on the template button you just moved into place.

If you have made a template that you would like to see on every chart all the time without having to hit the template button on each chart you need to go to Settings < General Settings and under the 'Default Template' box browse to find your particular template and open it, tick Always use default template, and press OK button.

Now close the chart then re-open it, your template will now be the default template and you will view it on every chart you open within this market. If "Always use default template" is checked in the General Settings dialog box, ShareChart will apply the default template to every open chart no matter whether you have changed settings for the chart previously. If "Always use default template" is unchecked, the chart settings from the default template will only be applied to newly open charts. Therefore, any setting changes to an open chart will not be overwritten by the default template.

TIP: ShareChart has made setting default template easy for you. If you are happy with the current settings on the current chart and would like to set the settings as default template, simply right click on the chart and select "Set as Default Template" from the popup menu. In this case, the current settings will be saved to the default template file specified in the General Settings dialog box.

9.5 EDITING WATCH FOLDERS

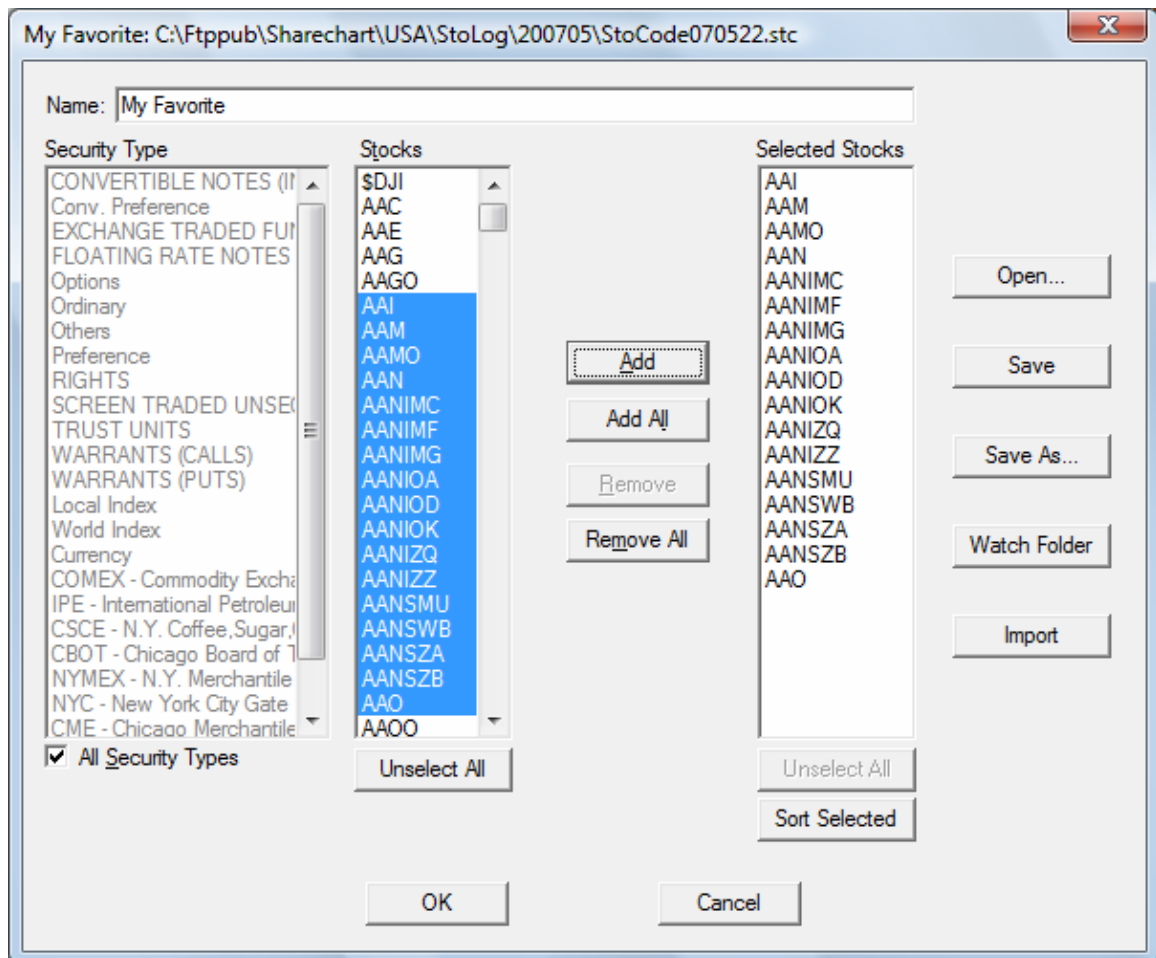
In Watch Folders dropdown box of the Stock Group Bar, there are seven editable watch folders. They are:

- My Major Watch
- My Favorite
- My Holding
- My Watch
- My Optionable Stocks
- My Covered Call Stocks
- My CFD Stocks

Others such as Top Volume etc are non-editable. They are normally generated by ShareChart from your grouping or analysis.

You can edit editable watch folders using the Watch Folder Editor by selecting Edit < Edit, and selecting one of the above folders to edit. In this section, we use My Favorite as our watch folder to edit.

Select My Favorite from the editable Watch Folders list, the following Edit dialog box will appear. The title of the dialog box is shown with the file name of the stock list, as shown in the following figure.



Editing Watch Folders

Initially, All Securities check box is ticked so that Security Type list box is not selectable. Therefore, the stock list box is filled with the stocks of the whole market. No items in both Stocks and the Selected Stocks list boxes are selected. Therefore, 'Add' and 'Remove' buttons are grayed. The 'Unselect All' button under each list box is also grayed because there is no selection. When you select a stock in the Stocks list box, both the 'Add' button and the 'Unselect All' button under the Stocks list box will be enabled. You can then click on the 'Add' button to add your selected stocks to the 'Selected Stocks' list box. Similarly, when you select a stock in the Selected Stocks list box, both the 'Remove' button and the 'Unselect All' button under the Selected Stocks list box will be enabled. You can then click on the 'Remove' button to remove the selected stocks from the 'Selected Stocks' list box.

In both list boxes, you can type the stock code to quickly move to the stock that you want to select. If you make multiple selections and later on you decide to cancel all the selections, you can click on the 'Unselect All' button under the list box to cancel them.

You can make multiple selections in both list boxes by holding the CTRL or SHIFT key while making your selections.

You can also click on the 'Add All' button to add all stocks in the Stocks list box to the Selected Stocks list box. Or, you can click on the 'Remove All' button to remove all stocks in the Selected Stocks list box. Sometimes, these two keys prove to be very convenient.

'All Securities' check box is for the Security Type list box. If you uncheck this box, the items in the Security Type list box will become available to select. Whenever you select an item in the Security Type list box, all stocks belong to the selected security type will be displayed in the Stock list box. You can make multiple selections in the Security Type list box by holding SHIFT or CTRL key.

In the name field, you can change the folder name under editing. Once you change the folder name, the folder name in all menus and dropdown boxes will be changed accordingly.

You can save the stock list by clicking on the 'Save' button. You can also save the stock list under current editing to a different file by clicking on the 'Save As...' button. A standard Save As dialog box will appear. Once you have chosen a file name, the file name will appear on the title bar of the edit dialog box and becomes current. You can open a saved file for editing by clicking on 'Open'. A standard Open dialog box will appear. Once you have selected a file to open, the file name will appear on the title bar of the edit dialog box. In both Open and Save As cases, the changed file will be the favorite stocks under current editing.

You can assign the stocks of the current selected Watch Folder from the Group Bar to My Favorite by clicking Watch Folder button. For example, if the current selected watch folder is Top Volume, then all top volume stocks will be assigned to My Favorite. This is useful if you want to associate with grouped stocks with My Favorite from time to time.

You can also import stocks from Watch Page or Portfolio by clicking Import button and selected appropriate Watch Page or Portfolio file. The Import feature can be used to import any file that has stock codes at the beginning of each line, separated by a space.

You can sort the selected stocks by clicking on the Sort Selected button.

Clicking the OK button will return you to the ShareChart main window. The current favorite stocks and associated file name under editing will become the current favorite stocks for ShareChart.

***TIP:** ShareChart has provided an easy way for editing My Favorite Stocks: you can simply right click on the chart and select Add to My Favorite or Delete From My Favorite from the popup menu. This will add/delete the current stock under viewing to/from My Favorite Stocks.*

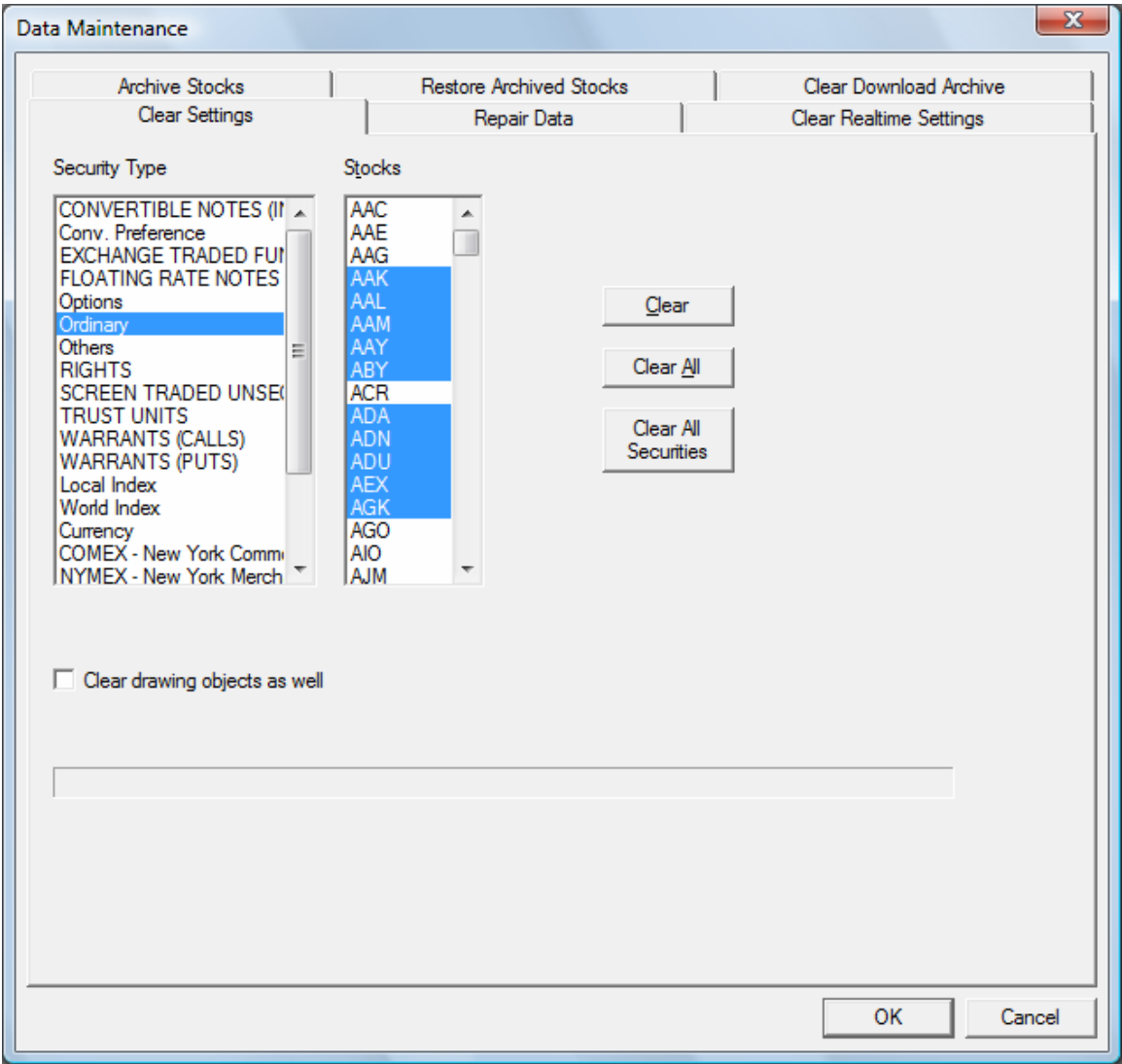
ShareChart also provides an optional link between My Holding and Portfolio. If you tick "Link My Holding Folder with the current portfolio" in the General Settings dialog box, any changes in the current portfolio will be automatically saved to My Holding Folder when saving the current portfolio.

CHAPTER 10 DATA MAINTENANCE

10.1 CLEAR SETTINGS

In ShareChart, all of your work is saved into a setting file. Thus, the settings for each stock are saved in a file with the stock code as a file name with the extension “.wss”. The global settings that apply to all stocks are saved in file “sharechart.wsc”. Although you can use Windows Explorer or similar file managers to delete these files if you want to completely abandon your changes, ShareChart provides you a more convenient way to selectively delete the settings.

To clear settings, go to Tools < Data Maintenance, and select Clear Settings page. The following Clear Settings page will appear.



Choose a security type, the stock code list box will only show stocks with saved settings (ie. the stocks that you have opened) in respect to the selected security type. You can make multiple selections in the Stock Code list box by holding the ctrl or shift key. Once selections are made, click on the Clear button to clear the settings for the selected stocks.

Clear Settings

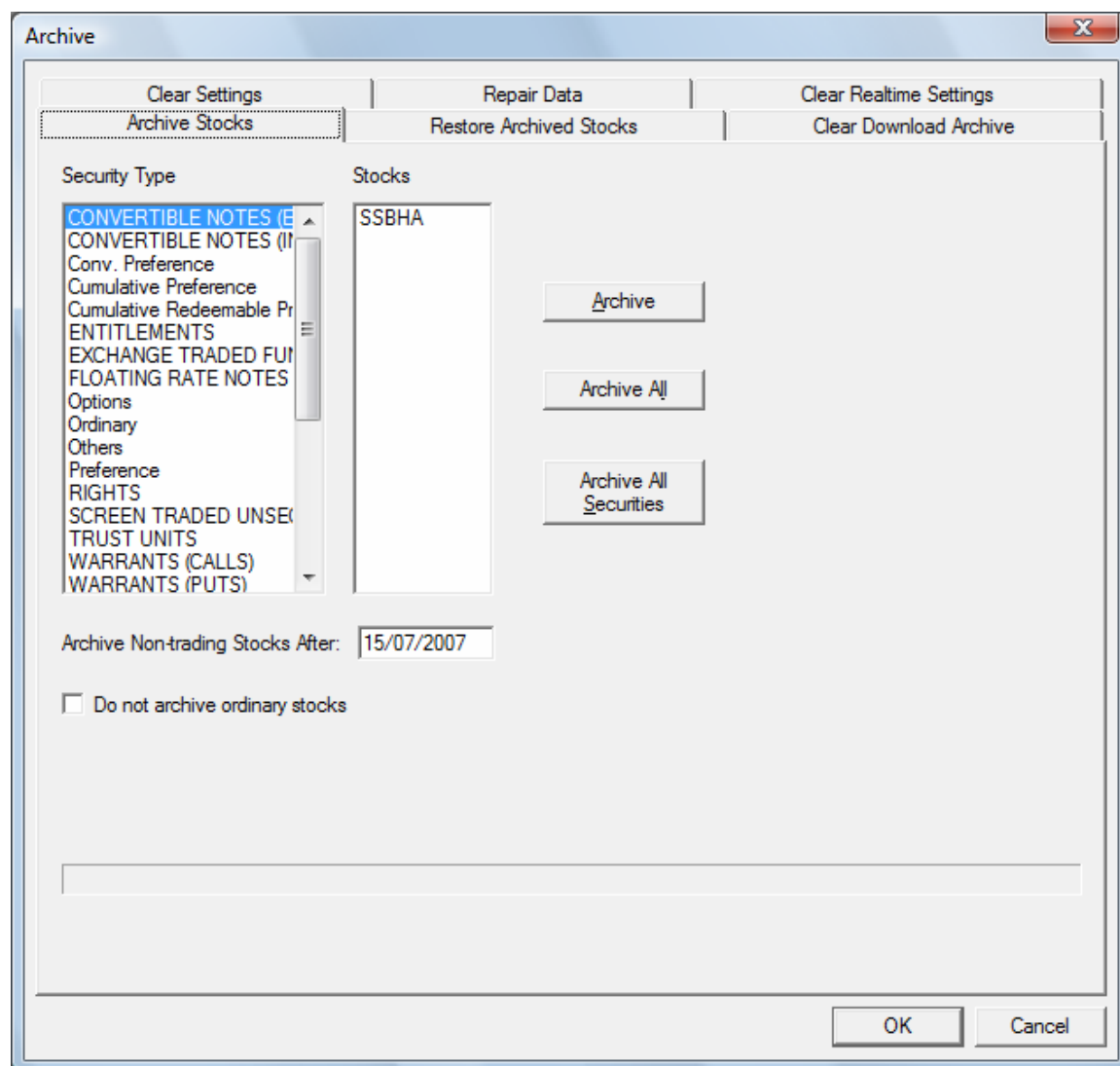
If you click on the Clear All button, you clear settings for all stocks of the selected security type regardless of the selection in the Stocks list box. If the Clear All Securities button is clicked, then settings for all stocks of the whole market are cleared.

You can include clearing drawing object files by simply ticking Clear drawing objects as well checkbox when clearing settings.

Similarly, you can also clear settings for real time charts by selecting the Clear Real-time Settings tab.

10.2 ARCHIVE

You may archive stocks that are no longer traded. To open the Archive box, click on Tools < Data Maintenance and select Archive page. The following Archive page will appear:



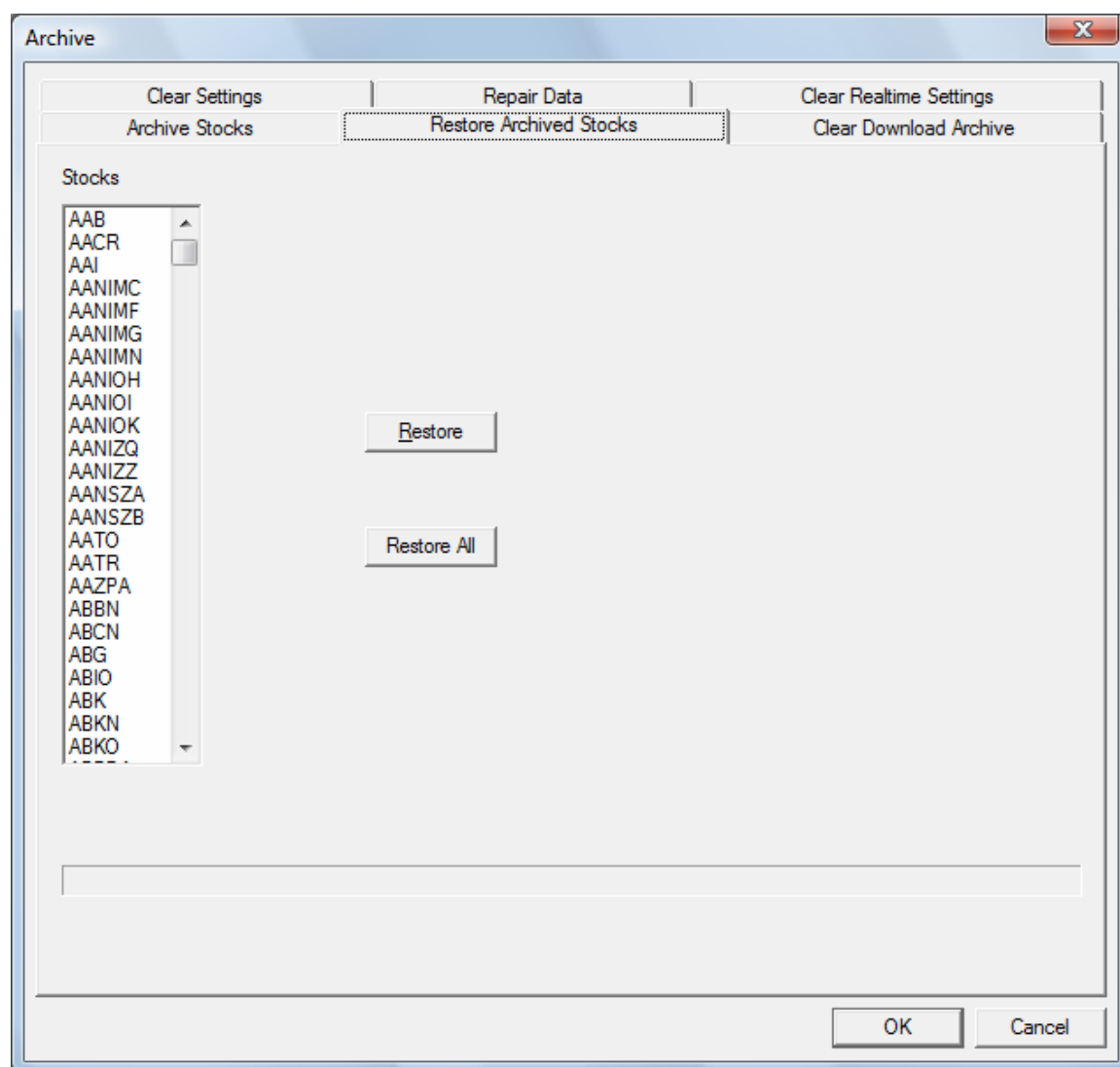
Choose a security type, the stock code list box will show stocks corresponding to the selected security type. You can make multiple selections in the Stock Code list box by holding the CTRL or SHIFT key. Once your selections are made, click on the "Archive" button to archive the selected stocks.

You can click on the "Archive All" button to archive all stocks of the selected security type without selecting them. If the "Archive All Securities" button is clicked, then all stocks of all security types will be archived.

The archived stocks will be saved to a folder called "ARCHIVE" under each market with exactly the same database structure as the market. Therefore, you can treat "ARCHIVE" as a separate market. For example, when you archive stocks for the USA market, an "ARCHIVE" folder is created under USA with A, B, ...Z subfolders. You can then switch to "ARCHIVE" under USA by typing "USA\ARCHIVE" in the "Data Directory" field of the General Settings dialog box. By switching to "USA\ARCHIVE", you can treat "USA\ARCHIVE" as a completely separate market.

ShareChart provides an option to allow you periodically archive non-trading stocks for the whole market. All you need is to tick "automatic data archive" in the General Settings and number of days for archiving. ShareChart will automatically archive non-trading stocks for the specified time interval.

You can restore the archived stocks by opening the "Restore Archived Stocks" page. The following "Restore Archived Stocks" page will appear:



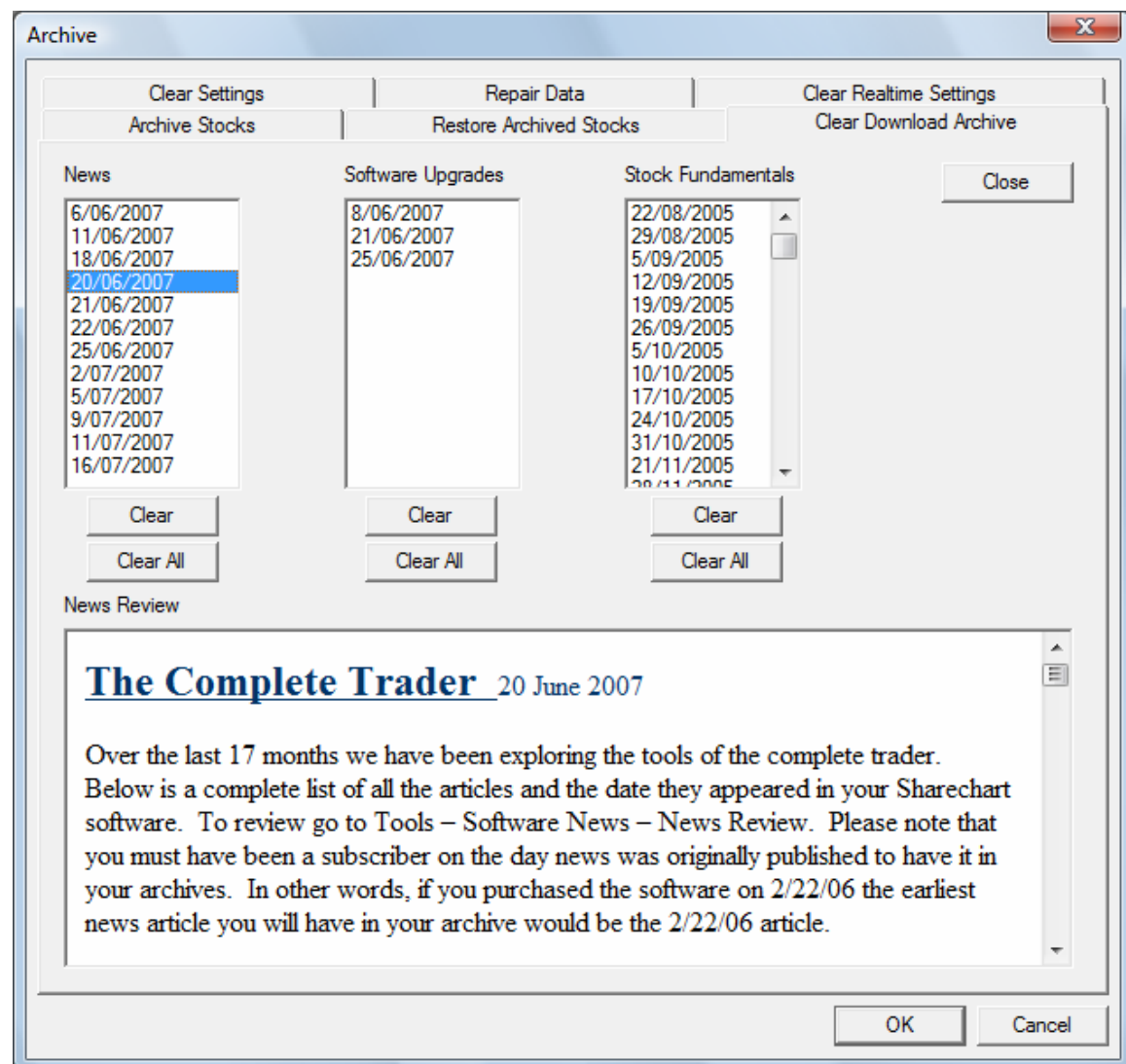
Archive

Data Maintenance

Select the stocks in the "Stocks" list box and click on the "Restore" button. You can restore all stocks by clicking the "Restore All" button.

The "Clear Download Archive" page as shown below will allow you to delete downloaded news, stock fundamentals, and upgrades. Select the items that you want to delete and click on the Clear button under the selection. You can click the "Clear All" button to clear all items in the list box regardless of the selection.

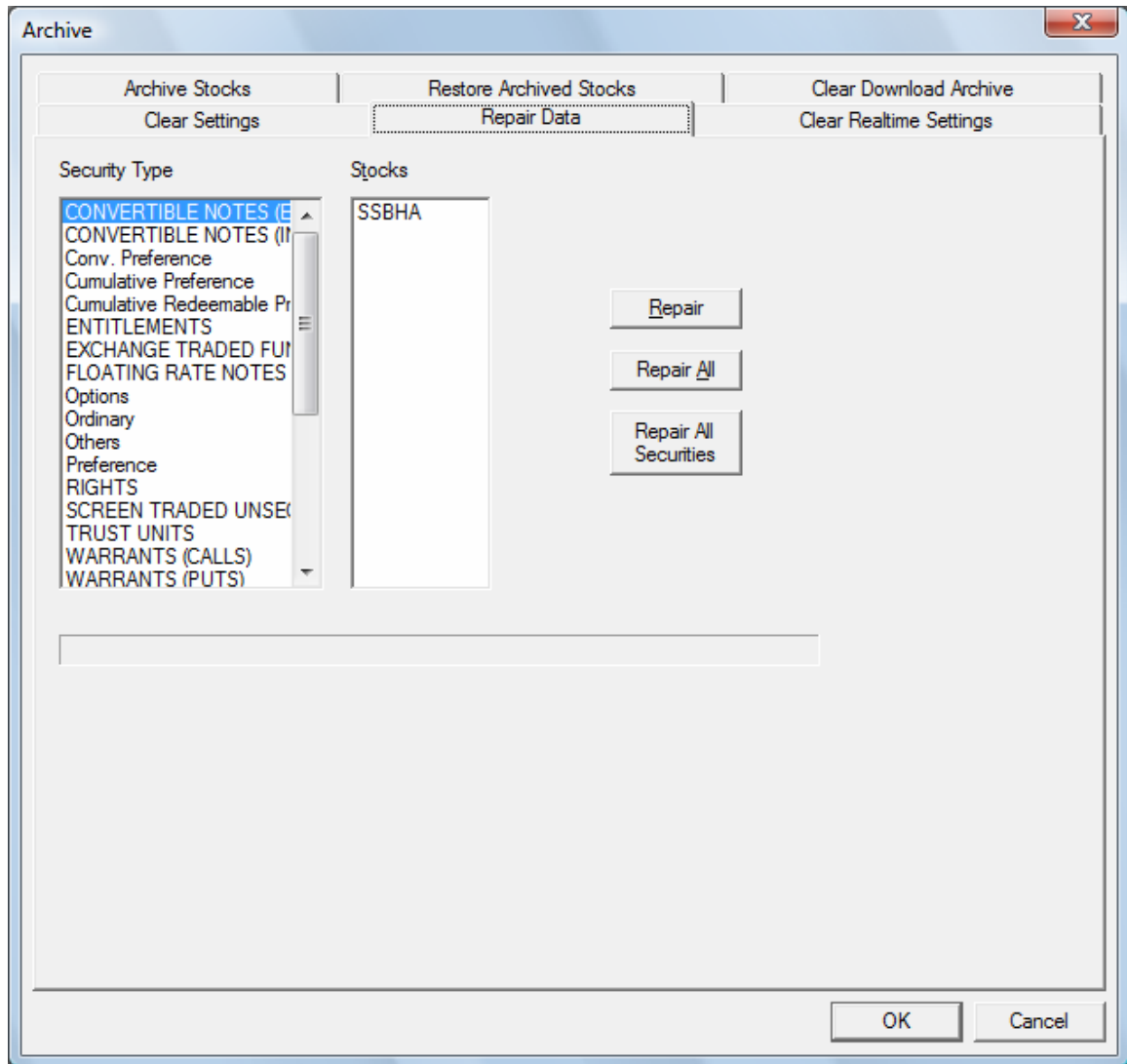
When you select a date in the News list box, the news for the selected date will be replayed. This can also be a useful tool for you to review news for certain days.



Repair Data

10.3 REPAIR DATA

You can repair the stock raw data if they appear damaged. To open the Repair Data box, click on Tools < Data Maintenance and select Repair Data page. The following Repair Data page will appear:



Choose a security type, the stock code list box will show stocks corresponding to the selected security type. You can make multiple selections in the Stock Code list box by holding the CTRL or SHIFT key. Once your selections are made, click on the "Repair" button to repair the selected stocks.

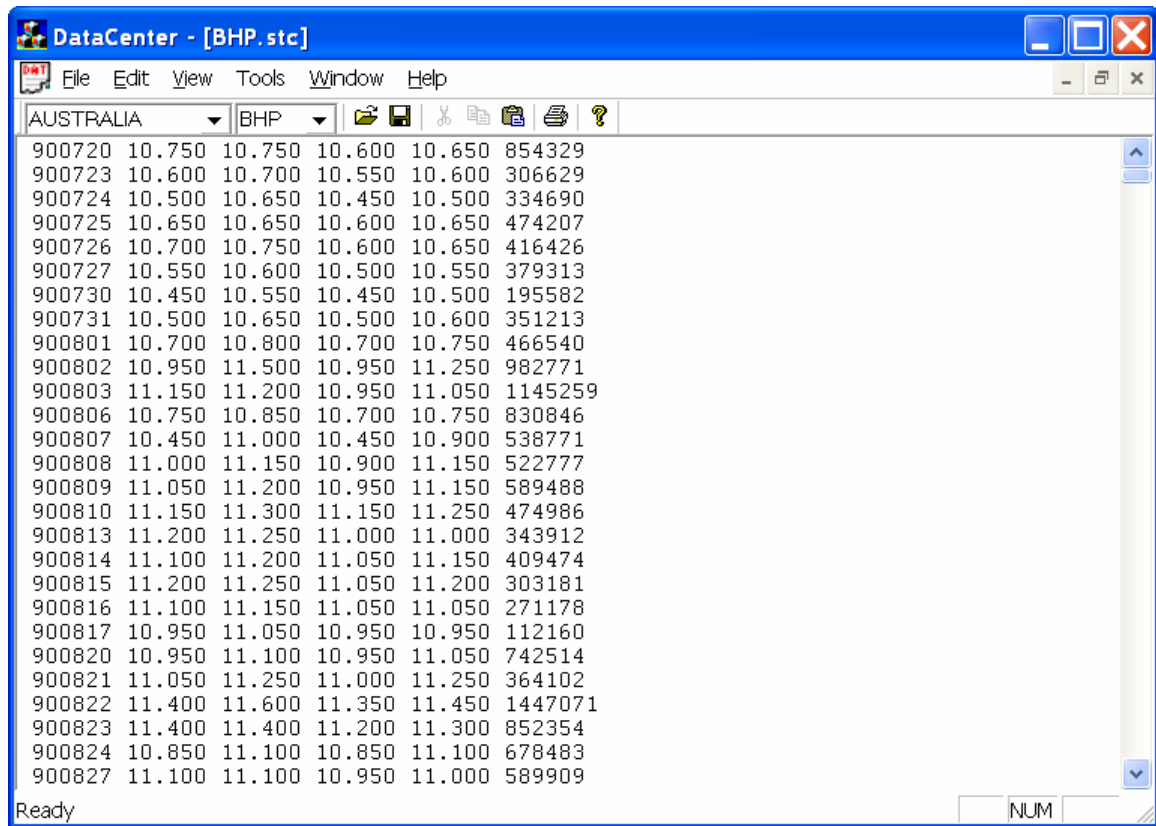
You can click on the "Repair All" button to repair all stocks of the selected security type without selecting them. If the "Repair All Securities" button is clicked, then all stocks of all security types will be repaired.

10.4 DATA CENTER

ShareChart has included a standalone program called Data Center that will allow you to maintain data without running ShareChart. In some cases, ShareChart will not start because of corrupted data. The corrupted data can be caused by abnormally exiting ShareChart, virus infection, and many other unforeseeable factors. Data Center will allow you to maintain or repair the corrupted data so that ShareChart will start normally. It is highly recommended that you close ShareChart and access the Data Center from Start < Programs < Sharechart < Data Center. With Data Center you can perform a clean up for ShareChart global settings, backup or restore ShareChart. You can even edit the stock data for any modifications that you want to make to the raw data.

10.3.1 Editing Stock Data

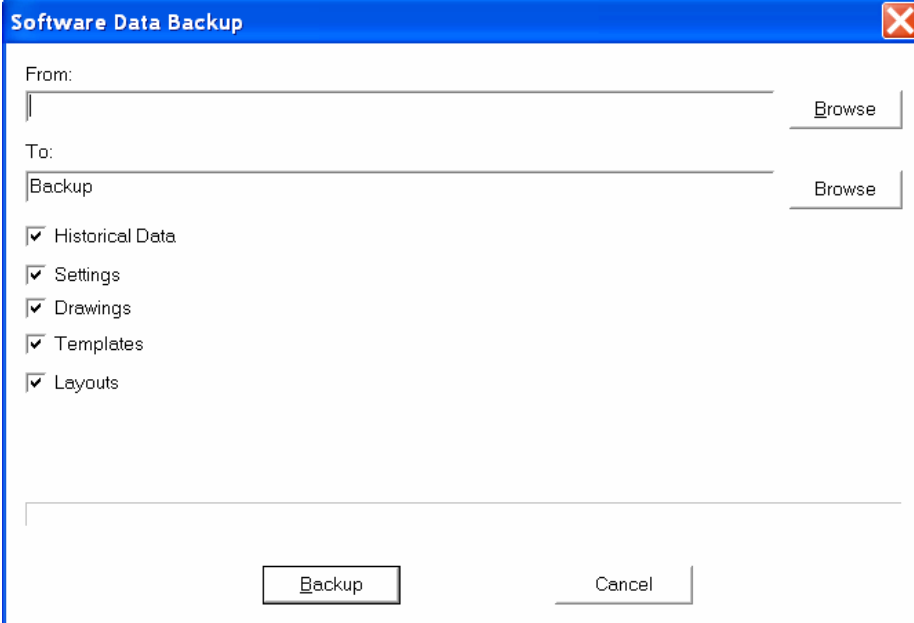
When Data Center starts, it just shows a gray window. You should first select a market from the Market dropdown box and select a stock code from the Stock Code dropdown box to open the data file for the stock. A screen shot for BHP from the Australia market is shown below.



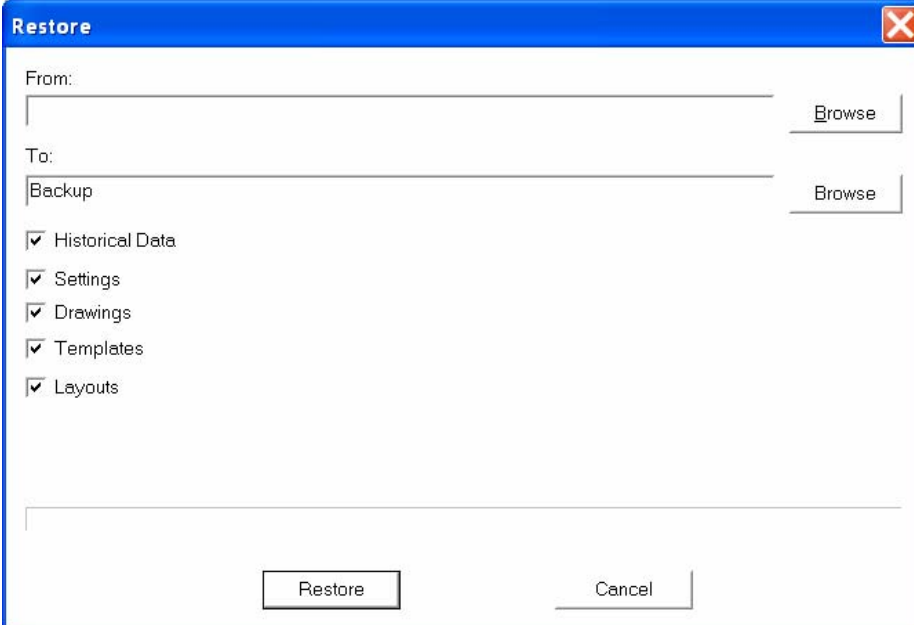
You can edit the above data just like using a normal text editor such as notepad. When you finish editing simply close the data file. You may also need to ensure that there should be no spaces in a single data and a space between data. Each row should contain only one- day data.

10.3.2 Backup / Restore ShareChart

You can use Data Centre to backup / restore ShareChart. To backup, select File / Backup menu item. The following dialog box appears (make sure you select a market first).



The 'Software Data Backup' dialog box has a blue title bar with a close button. It contains two text input fields: 'From:' and 'To:'. The 'From:' field is empty, and the 'To:' field contains the text 'Backup'. To the right of each field is a 'Browse' button. Below these fields are five checked checkboxes: 'Historical Data', 'Settings', 'Drawings', 'Templates', and 'Layouts'. At the bottom are two buttons: 'Backup' and 'Cancel'.



The 'Restore' dialog box has a blue title bar with a close button. It contains two text input fields: 'From:' and 'To:'. The 'From:' field is empty, and the 'To:' field contains the text 'Backup'. To the right of each field is a 'Browse' button. Below these fields are five checked checkboxes: 'Historical Data', 'Settings', 'Drawings', 'Templates', and 'Layouts'. At the bottom are two buttons: 'Restore' and 'Cancel'.

From the dialog, you can select the source to backup. In most case, you can leave it blank that will allow you to backup from the current location. You can choose different locations by selecting the 'Browse' button on the right. In the "To" field, you should select a different location by selecting the 'Browse' button. If you do not select a location, ShareChart will be backed up to Backup folder under the current location. Once you have selected your desired locations and backup options, you can simply click the 'Backup' button to start the backup process. The backup time will vary depending on the options that you have selected, the data size in ShareChart, and your computer speed.

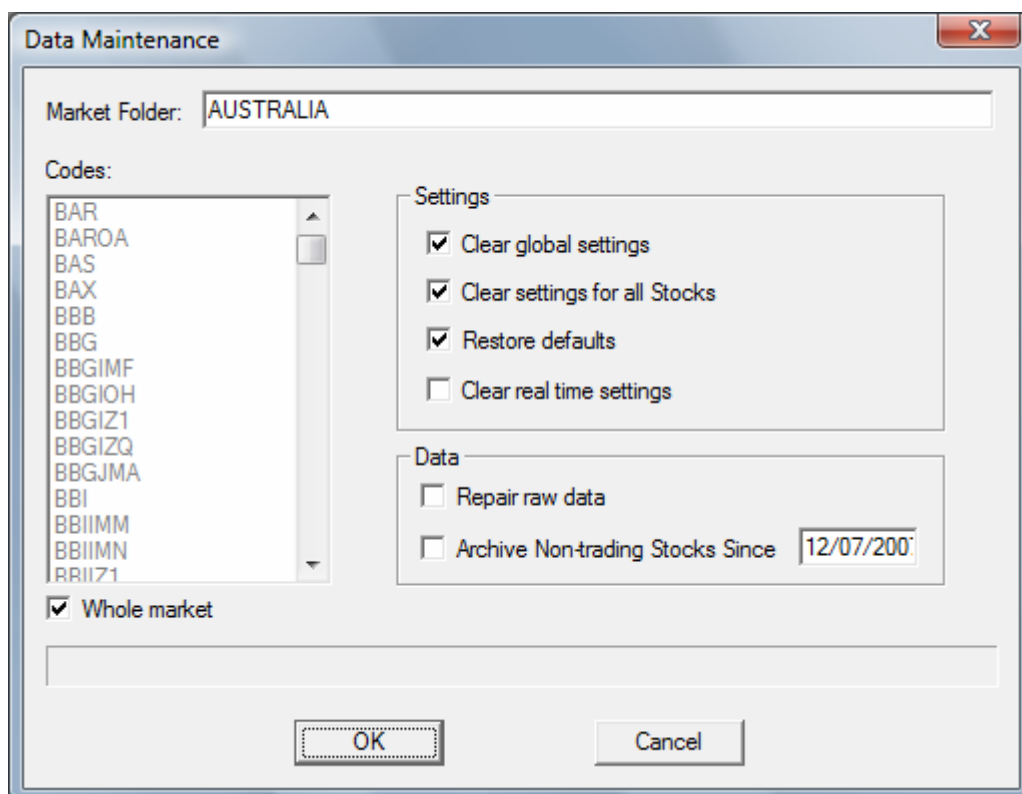
Backup/Restore

Data Maintenance

To restore, select File / Restore, a similar dialog box will appear where you can select source and destination selections, select restore options, and click 'Restore' to start the restore process. Again the restore time depends on the selected restore options, data size and your computer speed.

10.3.3 Data Maintenance

Data Maintenance will allow you to maintain data in the market folder. To perform data maintenance, select Tools < Data Maintenance from Data Center, the following dialog box appears.



When the dialog box open, it will take the current market selected in Data Center, and fill it in "Market Folder" field. All codes for the selected market will be filled in "Codes" dropdown box. "Whole market" checkbox is ticked by default, allowing you to perform data maintenance for the whole market. If you uncheck the "Whole market" checkbox, you can select stocks in "Codes" dropdown box to perform data maintenance. You can change the market in "Market Folder" to any data folder for Data Center to perform data maintenance.

The following are the explanation of data maintenance operations.

Clear global settings will allow you clear settings for the market folder, e.g. top stocks and alerts global settings.

Clear settings for all stocks will clear settings that have been saved for each stock, e.g. background color, indicator and drawing settings.

Restore defaults will restore the initial settings when you began using ShareChart.

Backup/Restore

Data Maintenance

Clear real time settings will clear real time settings that have been saved for each stock during viewing real time charts, e.g. background color, indicator and drawing settings.

Repair raw data will scan, checking each data file for errors and repair them if there are errors.

Archive non-trading stocks since will archive any stocks that appear stopping trading after the specified date.

Sharechart

CHAPTER 11 CHARTING ANALYSIS

11.1 OVERVIEW

Charting analyses tools allow you to scan active shares based on technical analysis. ShareChart assumes that you already understand how to perform technical analysis. Therefore charting analyses are for standard and professional versions only. Furthermore, only limited number of charting analyses is available for standard version.

ShareChart provides up to ten types of charting analysis tools in the Full Professional Version:

- Fundamental Analysis
- Indicator Analysis
- Indicator Crossing Analysis
- Divergence Analysis
- Breakout Analysis
- Re-tracement Analysis
- Bottom Analysis
- Reversal Analysis
- Candlestick Reversal Pattern Analysis
- Score System

Each analysis has specific parameters that will be discussed in the next subsections. There are, however, common parameters among all charting analyses as follows.

Stock List box: All Stocks are listed in this box. The list will amend to the selections you make from the Watch List or Pre-selected Stocks groups.

Dates: involved in the analysis. If the dates are more than one day, then all stocks analyzed for each date in the date range will be listed. In this case, the date for a particular analyzed stock cannot be identified. Therefore, it is advisable to enter only one day for stock analysis.

Price: Closing price range for stocks involved in the analysis. A zero value in the upper band of the price range will indicate there is no upper price limit for stocks. The price range allows you to filter some stocks from the analysis. For example, [0.1, 0] will indicate that you only want stocks with a close price of more than 10 cents to be involved in the analysis.

Volume: Volume range for stocks involved in the analysis. A zero value in the upper band of the volume range will indicate there is no upper volume limit for stocks. The volume range allows you to filter some stocks from analysis. For example, [50,000, 0] will indicate that you only want stocks with a trading volume of more than 50,000 to be involved in the analysis.

Trades: Number of trades range for stocks involved in the analysis. A zero value in the upper band of the trades range will indicate that there is no upper trades limit for stocks. The trade's range allows you to filter out some stocks from analysis. For example, [10, 0] will indicate that you only want stocks with a number of trades more than 10 to be involved in the analysis.

Value: Value range for stocks involved in the analysis. A zero value in the upper band of the value range will indicate that there is no upper value limit for stocks. The value range

Overview

Charting Analysis

allows you to filter some stocks from the analysis. For example, [10,000, 0] will indicate that you only want stocks with a trading value of more than \$10,000 to be involved in the analysis.

Chart Category: This dropdown box contains all chart categories. You analyze stocks for a specified chart category. For example, you can analyze stocks for weekly charts.

Price Category: This dropdown box allows you to calculate some indicators based on price categories apart from closing price. With this dropdown box, you can calculate some indicators on open, high, and low prices as well.

Top: This check box allows you to view the specified number of top stocks from the analyzed stocks.

Watch List: This dropdown box contains all the watch lists. You can perform analysis on your own pre set watch lists, e.g. My Favorite, My Watch etc. This box also contains the Platinum pre set stock groups within the U.S.A Market.

Pre-selected Stocks: This dropdown box contains the lists of pre-selected stocks. For the Australia market, they are Optionable stocks, ASX 20, ASX 50, ASX 100, ASX 200, ASX 300, ASX All Ordinaries, and ASX Small Ordinaries. For the USA market, they are Optionable stocks, S&P 100, S&P 500, S&P 1000, S&P 1500, S&P Mid Cap 400, and S&P Mid Cap 600.

You should tick the "Select All Stocks" check box, so that all stocks in the "Stock" list box will be included in the analysis. If it is unchecked, you should make selections to allow only selected stocks in the analysis. To make selections, hold the CTRL or SHIFT key while clicking the mouse in the list box. You can reset the content of the stocks to be analyzed in the list box to the original full set of stocks by clicking on the Reset button.

For all types of charting analyses, the common operations are: when the analysis dialog box is started, ShareChart will default to the last trading date for the date range. You can choose whether you want a long or short analysis by checking the corresponding check box. The default is for long analysis.

When you have filled all relevant fields, click the Analyze button to start the analysis. The analysis process will normally take a few minutes depending on the speed of your PC and the size of the group of stocks you have selected to analyze. When the analysis is complete, a message box will be displayed informing you of the completion of the analysis. Click the OK button to return to the charting analysis dialog box.

Once you click on the OK button, ShareChart will return to the main chart window. The Watch Folder dropdown box will set "Charting Analyzed List" as the current selection. Its corresponding code box will be filled with the analyzed stocks. The Stock Ticker Bar will also show the analyzed stocks.

ShareChart will automatically save analyzed stocks to a file once you click the OK button. The files are named as follows depending on the types of charting analyses. The name format is SP?yyymmdd.txt. Where, ? is the analysis name and yyymmdd is the date of the upper date range in the analysis dialog box. For example, you have completed Indicator Analysis for dates [01/07/2000 - 06/07/2000], the analyzed stocks will be saved to file SPIndicator000706.txt.

You can open the saved stock analysis file using the "Open" button in the charting analysis dialog box. You can also save the analyzed stocks to a different file using the "Save As" button on the analysis dialog box.

Overview

Charting Analysis

You can perform charting analysis during an open market. This will allow you to get a better trading position during the market open. All you need to do is to download the data for the current day during market open and perform the charting analysis.

A successful analysis depends mainly on the parameters that you set for each analysis. These parameters are transparent to you. Therefore, it is important that you understand the parameters. The parameters for each analysis are described in the following subsections.

Sharechart

11.2 FUNDAMENTALS ANALYSIS

Fundamentals Analysis is essential to your stock selection. Therefore, fundamentals analysis for scanning stocks with potential growth is the first step towards your stock selection. With the combination of data range for fundamental ratios (parameters), you can narrow down stocks that fall into the category of your interest. For example, you may want to scan stocks with positive EPS growth so that you can compare whether the current price with the current EPS is undervalued based on the price and EPS a year ago.

To use the Fundamentals Analysis, go to Charting Analysis < Fundamentals. The following Fundamentals Analysis dialog box will appear:

Fundamental Analysis - AUSTRALIA\scan\Fundamentals.scn

Watch Folders: Charting analysis is for analyzing active shares purely based on ☐ Top 10

Preselected: All Stocks

Stocks: SDJI, AAC, AAE, AAG, AAGO, AAI, AAM, AAMO, AAN, AANIMC, AANIMF, AANIMG, AANIOA, AANIOD, AANIOK, AANIZQ, AANIZZ, AANSMU, AANSWB, AANSZA, AANSZR

☒ Select All Stocks

Reset

=====> Move as analyzed stocks <=====

Data Range

Dates: 24/09/2007 - 24/09/2007 Chart Category: Daily

Price: 0.1 - 0 Trades: 0 - 0

Volume: 50000 - 0 Value: 0 - 0

Parameters	Range	Include
Market Capitalization:	1000000 - 0	<input type="checkbox"/>
Price Earnings (PE):	0.1 - 15	<input type="checkbox"/>
Earning Yield (%):	5 - 0	<input type="checkbox"/>
Dividend Yield (%):	5 - 0	<input type="checkbox"/>
Ex-Dividend Date:	24/09/2007 - 23/09/2008	<input type="checkbox"/>
EPS Change (%):	10 - 0	<input type="checkbox"/>
PE Change (%):	10 - 0	<input type="checkbox"/>

Restore Default Open Profile... Open Result

Save Profile Save Result

Save Profile As... Save Result As...

Analyze

Sort by Alphabetic

OK

Apart from common parameters and operation procedures for all analyses, the following parameters and operation procedures to Fundamentals Analysis are described.

Market Capitalization: With this parameter, you can scan for stocks with market capitalization within the range you specified. The lower limit of the range is 0, the upper limit is not limited if 0 is entered.

Price Earnings (PE): Price Earnings is usually entered in times. The lower limit of the range is 0, the upper limit is not limited if 0 is entered.

Earning Yield (%): Earning Yield is usually entered percentage (%). The lower limit of the range is 0 but you can enter negative percentage numbers if you wish to scan for negative EPS stocks. The upper limit is not limited if 0 is entered.

Fundamentals Analysis

Charting Analysis

Dividend Yield (%): Dividend Yield is usually entered percentage (%). The lower limit of the range is 0, the upper limit is not limited if 0 is entered.

Ex-Dividend Date: Ex-Dividend Date range is automatically filled with current date and a date that is a year after. You can change them according your timeframe.

EPS Change (%): With EPS Change, you can scan for growth stocks with positive EPS change range and decline stocks with negative EPS change range. ShareChart will analyze the EPS change for each stock based on the current EPS value and EPS a year ago. Any stock that falls into your specified range will be picked up.

PE Change (%): With PE Change, you can scan for growth stocks with negative PE change range and decline stocks with positive PE change range. ShareChart will analyze the PE change for each stock based on the current PE value and PE a year ago. Any stock that falls into your specified range will be picked up.

For any of the fields above, you can choose to include each of them into the analysis by checking the Include column.

Sharechart

11.3 PRICE AND VOLUME ANALYSIS

Price and Volume Analysis will search for stocks that meet the change range criteria. It is used to identify stock prices or volume that are in up or down trend, or sideways, within a specified period. It is also a useful tool to analyze the interaction between prices and volume.

To use the Price and Volume Analysis, go to Charting Analysis < Price and Volume. The following Price and Volume Analysis dialog box will appear:

Apart from common parameters and operation procedures for all analyses, the following parameters and operation procedures to Price and Volume Analysis are described.

Price Change: When Price Change is selected, you instruct the analyzer to include price change into analysis.

Volume Change: When Volume Change is selected, you instruct the analyzer to include volume change into analysis.

For the above changes, specify the change range by either absolute value or percentage by ticking the % checkbox. If you want the change range to be unlimited, simply tick Infinite checkbox.

The Within Period column is used to specify the period within which stocks satisfy the change criteria. Price Action dropdown box allows you to specify whether the change should be up, down, or sideways.

Sharechart

11.4 INDICATOR ANALYSIS

Indicator Analysis allows you to analyze shares based on popular indicators. With the combination of indicators involved in the analysis, you will be able to achieve different results with different parameters. Therefore, Indicator Analysis offers you great flexibility for you to perform share analysis.

To use the Indicator Analysis, go to Charting Analysis < Indicators. The following Indicator Analysis dialog box will appear:

Apart from common parameters and operation procedures for all analyses, the following parameters and operation procedures to Indicator Analysis are described.

Volume Change: Volume Change will allow you to specify the change in volume. If you check the Percentage check box, the change is in percentage. For example, Volume Change of 10 with Percentage checked means that you want stocks with more than 10% of volume change in the analysis. With a positive number in the “Within Period” field, you restrict the volume change in the same direction within the specified field.

Price Change: Price Change is the close price change relative to the previous close price. If Percentage is checked, then the price change is in percentage. For example, a price Change of 3 with Percentage checked indicates that you want stocks with more than 3% of price change in the analysis. With a positive number in the “Within Period” field, you restrict the price change in the same direction within the specified field.

Indicator Analysis

Moving Average: In many cases, you want the close price to be above the moving average to confirm the bullish trend. This parameter allows you to do so. The first field is the period of the moving average. The second field is the change of the close price relative to the moving average. If Percentage is checked, then the price change is in percentage. For example, a change of 3 with Percentage checked means that you want stocks with the close price 3% or more than the moving average in the analysis. With a positive number in the "Within Period" field, you restrict the change between price and moving average in the same direction within the specified field.

RSI: Relative Strength Index to be involved in the analysis. The first field is the period of the indicator. The second and third fields indicate the range that the indicator of the stock must be satisfied. For example, a range of [30, 70] means that you want the analyzer to analyze stocks with RSI values less than 30 or more than 70. With a positive number in the "Within Period" field, you restrict the change between price and RSI in the same direction within the specified field.

Stochastic: Stochastic indicator to be involved in the analysis. The first field is the period of the indicator. The second and third fields indicate the range that the indicator of the stock must be satisfied. For example, a range of [30, 70] means that you want the analyzer to analyze stocks with Stochastic values less than 30 or more than 70. With a positive number in the "Within Period" field, you restrict the change between price and Stochastic in the same direction within the specified field.

Bollinger Band: Bollinger Band to be involved in the analysis. The first field is the period of the indicator. The second and third fields indicate the lower and upper bands of the Bollinger Band in terms of the standard deviation. For example, a range of [2, 2] means that the lower bound of the Bollinger Band is Moving Average - 2 * standard deviation and the upper band of the Bollinger Band is Moving Average + 2 * standard deviation. You want stocks with close prices below the lower band or above the upper band to be involved in analysis. With a positive number in the "Within Period" field, you restrict the change between price and Bollinger Band in the same direction within the specified field.

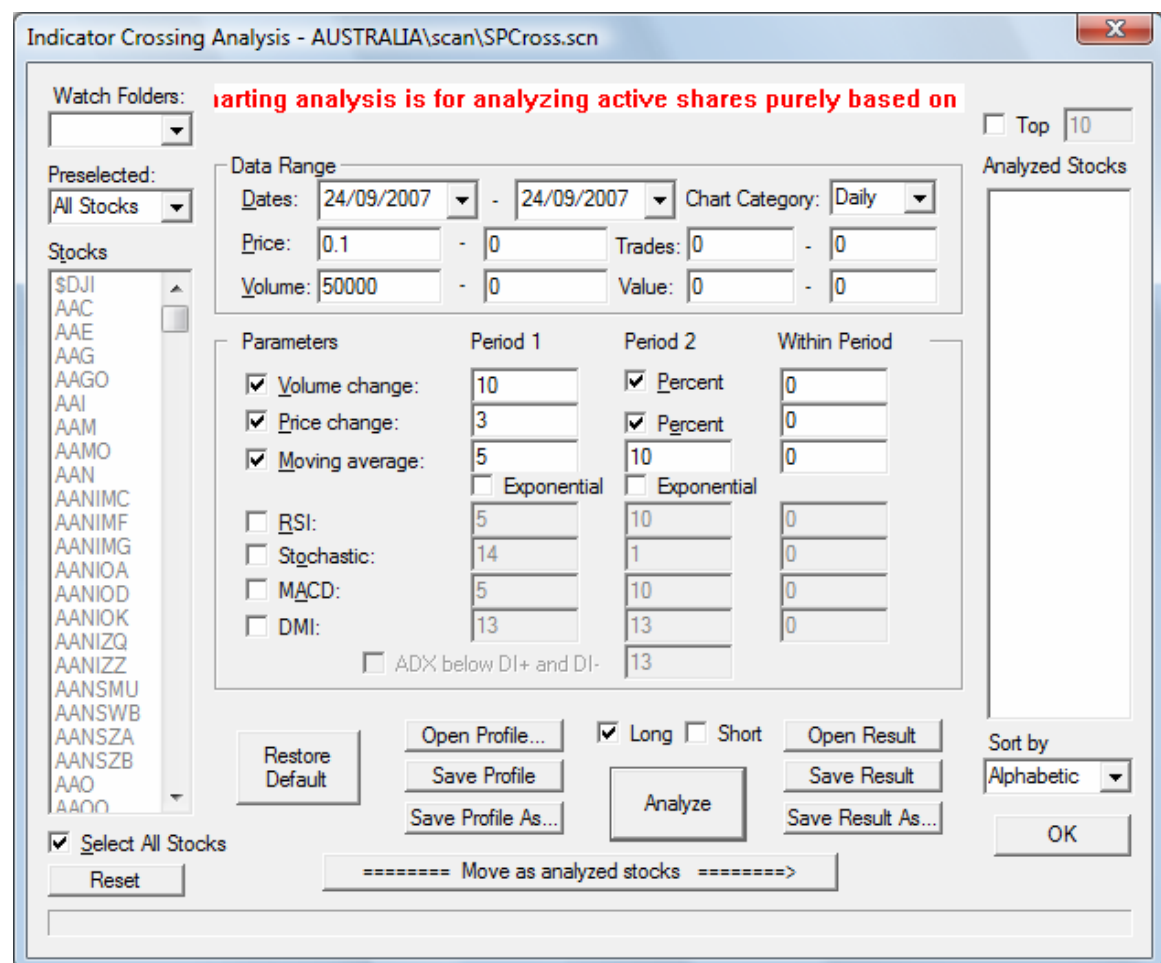
You can choose Long analysis or Short analysis. The default is for Long analysis. If you select Short analysis, you will need to adjust the parameters to negative values, e.g. volume change and price change. The Short analysis is useful for short selling or derivatives such as trading warrants, options or futures.

Indicator Crossing Analysis Charting Analysis

11.5 INDICATOR CROSSING ANALYSIS

Indicator crossing analysis is used to analyze stocks that have their indicators crossing at a point. Up to four indicators can participate in the indicator crossing analysis at any one time. They are Moving Averages, Relative Strength Index (RSI), Stochastic Oscillator, and MACD. However, you may not get any analyzed stocks if you allow all four indicators participating in the crossing analysis. The recommended way of performing the analysis is to do it in an interactive manner: allow one indicator in the crossing analysis at a time and reassign the analyzed stocks for further analysis.

To use the indicator crossing analysis, go to Charting Analysis < Indicators Crossing. The following Indicator Crossing Analysis dialog box will appear.



The dialog box is titled "Indicator Crossing Analysis - AUSTRALIA\scan\SPCross.scn". It features a "Watch Folders:" dropdown, a "Preselected:" dropdown set to "All Stocks", and a "Stocks" list on the left containing various stock tickers like \$DJI, AAC, AAE, etc. The "Data Range" section includes "Dates:" (24/09/2007 - 24/09/2007), "Chart Category:" (Daily), and fields for "Price:", "Volume:", "Trades:", and "Value:". The "Parameters" section has checkboxes for "Volume change:", "Price change:", "Moving average:", "RSI:", "Stochastic:", "MACD:", and "DMI:". Each has associated "Period 1", "Period 2", and "Within Period" fields. For example, "Volume change:" is checked with Period 1: 10, Period 2: 10, and Within Period: 0. There are also checkboxes for "Percent" and "Exponential" for several parameters. At the bottom, there are buttons for "Restore Default", "Open Profile...", "Save Profile", "Save Profile As...", "Long" (checked), "Short", "Open Result", "Save Result", "Save Result As...", "Analyze", and "OK". A "Select All Stocks" checkbox is also present. A red text overlay at the top right says "Charting analysis is for analyzing active shares purely based on".

Apart from the common parameters and operation procedures for all analyses, the following parameters and operation procedures apply to the Indicator Crossing Analysis.

Volume Change: Volume Change will allow you to specify the change in volume. If you check the Percentage check box, the change is in percentage. For example, Volume Change of 10 with Percentage checked means that you want stocks with more than 10% of volume change in the analysis. With a positive number in the "Within Period" field, you restrict the volume change in the same direction within the specified field.

Price Change: Price Change is the close price change relative to the previous close price. If Percentage is checked, then the price change is in percentage. For example, Price Change of 3 with Percentage checked indicates that you want stocks with more

Indicator Crossing Analysis

Charting Analysis

than 3% of price change in the analysis. With a positive number in the "Within Period" field, you restrict the price change in the same direction within the specified field.

Moving Average: This parameter allows the crossing of two moving averages in the analysis. The first and second fields are the periods of the two moving averages. You do not have to indicate that the first is the fast moving average or that the second is the slow moving average; ShareChart will automatically recognize this for you. With a positive number in the "Within Period" field, you expect that the crossing occurs within the specified field.

RSI: This parameter allows the crossing of two Relative Strength Indices in the analysis. The first and second fields are the periods of the two RSIs. You do not have to indicate that the first is the fast RSI or that the second is the slow RSI. ShareChart will automatically recognize this for you. With a positive number in the "Within Period" field, you expect that the crossing occurs within the specified field.

Stochastic: This parameter allows the crossing of two Stochastics in the analysis. The first and second fields are the periods of the two Stochastics. You do not have to indicate the first as fast Stochastic or the second as the slow Stochastic. ShareChart will automatically recognize this for you. With a positive number in the "Within Period" field, you expect that the crossing occurs within the specified field.

MACD: This parameter analyzes the crossing of the MACD line and the zero line. If the MACD moves across the zero line, it triggers long pick. Conversely, if the MACD line moves below the zero line, it triggers short pick.

DMI: This parameter analyzes the crossing of the DI+ and DI- lines. If the DI+ goes above DI-, it triggers long pick. Conversely, if DI+ goes below DI-, it triggers short pick. When ADX below DI+ and DI- is ticked, it requires that ADX should below DI+ and DI- to validate the pick.

You can choose Long analysis or Short analysis. The default is for Long analysis that analyzes the GOLD crossing. If you select Short analysis, you will be analyzing the DEAD crossing. For the definition of GOLD and DEAD crossing, refer to relevant technical analysis books. The Short analysis is useful for short selling or trading derivatives such as warrants, options or futures.

For any of the fields above, you can choose whether or not to include each of them in the analysis by checking the Include column.

Divergence Analysis

11.6 DIVERGENCE ANALYSIS

(This feature is for professional users only)

Divergence analysis is used to analyze stocks that have divergence behavior of their indicators against their price movement. Up to three indicators can participate in the divergence analysis at the same time. They are Volume, Relative Strength Index (RSI), and Stochastic Oscillator. However, you may not get any analyzed stocks if you allow all three indicators participating in the divergence analysis at one time. The recommended way of performing the analysis is to do it in an interactive manner: allow one indicator in the divergence analysis at a time and reassign the analyzed stocks for further analysis.

To use divergence analysis, go to Charting Analysis < Divergence menu. The following Divergence Analysis dialog box will appear.

Apart from the common parameters and operation procedures for all analyses, the following parameters and operation procedures apply to Divergence Analysis are described. Depending on whether the Long or Short analysis is checked, the interpretation of the parameters will vary.

Volume Change: Volume Change will allow you to specify the change in volume. If you check the Percentage check box, the change is in percentage. For example, Volume Change of 10 with Percentage checked means that you want stocks with more than 10% of volume change in the analysis. For long pick, 10% will be interpreted as volume trend is up and volume increases by at least 10% while the price trend is down. For short

Divergence Analysis

Charting Analysis

pick, 10% is interpreted as volume trend is down and volume decreased by at least 10% while the price trend is up.

Price Change: Price Change is the close price change relative to the previous close price. If Percentage is checked, then the price change is in percentage. For example, a price Change of 3 with Percentage checked indicates that you want stocks with more than a 3% price change in the analysis. For Long analysis, 3% is interpreted as price decreasing by at least 3%. For Short analysis, 3% is interpreted as price increasing by at least 3%.

RSI: This parameter allows the analysis of divergence between the prices and RSI values. The field to be filled is the period of the RSI. For Long analysis, the RSI trend will be up while the price trend is down. For Short analysis, the RSI trend will be down while the price trend is up.

Stochastic: This parameter allows the analysis of divergence between the price and the stochastic values. For Long analysis, the stochastic trend will be up while the price trend is down. For Short analysis, the stochastic trend will be down while the price trend is up.

The default selection is for Long analysis. The Short analysis is useful for short selling or trading derivatives such as warrants, options or futures.

Sharechart

11.7 BREAKOUT ANALYSIS

(This feature is for professional users only)

Breakout analysis is used to analyze stocks that have broken their medium or long-term trend. Depending on the periods that you specified in the Breakout Analysis dialog box, ShareChart will scan stocks with their closing prices breaking out your defined trend.

To use breakout analysis, go to Charting analysis < Breakout. The following Breakout Analysis dialog box will appear:

Apart from the common parameters and operation procedures for all analyses, the following parameters and operation procedures apply to Breakout Analysis. Depending on whether the Long or Short analysis is checked, the interpretation of the parameters will vary.

Volume Change: This parameter sets the period for calculating the average volume in the previous period. Volume Change is used to confirm the breakout with volume increase for either Long or Short analysis. If you check the Percentage check box, the change is in percentage. For example, Volume Change of 10 with Percentage checked means that you want stocks with more than 10% of volume change in the analysis.

Highest/Lowest Close: This parameter compares the current close with closes in the previous period that is specified (default is 15). For Long Analysis, Breakout Analysis will scan for the close that is the highest close for the previous period. For Short Analysis, Breakout Analysis will scan for the close that is the lowest close for the previous period. The number in the "Compare" field specifies how much it should be for the

Breakout Analysis

Charting Analysis

highest/lowest close. For example, 2 in "Compare" field with % and "Long" ticked indicates that you want scan for stocks that close at least 2% higher than the highest close in the previous period.

Gap: For long scan, this parameter scans for gap above the highest high of the previous period. Similarly, for short scan, the parameter scans for gap below the lowest low of the previous period. The value of gap can be specified in Compare field and the number period for the highest high/lowest low is specified in Within Period field.

Moving Average: This parameter scans for breakout of the moving average of the specified period (default is 150). For Long Analysis, Breakout Analysis will scan for the close that is above the moving average by the amount specified in the Compare field. For Short Analysis, Breakout Analysis will scan for the close that is below the moving average by the amount specified in the Compare field. You can specify how much is the breakout in relative to the moving average by filling a positive number in the "Compare" field. For example, 3 in "Compare" field with % and "Long" ticked indicates that you want scan for stocks that close at least 3% higher than the moving average.

Sharechart

Re-tracement Analysis

11.8 RE-TRACEMENT ANALYSIS

(This feature is for professional users only)

Re-tracement analysis is used to analyze stocks that have the potential to grow/fall in a short or medium term from their re-tracement. The basic idea is to discover the stocks that have just recovered from their re-tracement while following their overall up/down trends.

For Long Analysis, the support line indicator identifies the up-trend, while the resistance line indicator determines the re-tracement. For Short Analysis, the resistance line indicator identifies the down-trend, while the support line indicator determines the re-bounce. Therefore, the periods for support and resistance lines are the key factors in determining the up/down trend and re-tracement. You can specify the support and resistance periods in the Re-tracement Analysis dialog.

To use Re-tracement Analysis, go to Charting Analysis < Re-tracement. The following Re-tracement Analysis dialog box will appear:

Retracement Analysis - AUSTRALIA\scan\SPRetrace.scn

Watch Folders: [Dropdown] : results of the analysis do not constitute any recommendations

Preselected: All Stocks

Stocks: \$DJI, AAC, AAE, AAG, AAGO, AAI, AAM, AAMO, AAN, AANIMC, AANIMF, AANIMG, AANIOA, AANIOD, AANIOK, AANIZQ, AANIZZ

Top 10 Analyzed Stocks

Data Range

Dates: 24/09/2007 - 24/09/2007 Chart Category: Daily

Price: 0.1 - 0 Trades: 0 - 0

Volume: 50000 - 0 Value: 0 - 0

Parameters

Up/Down Trend Period: 60

Retrace Period: 30

☒ Volume Change: 0 % 10

☒ Moving Average (EMA): 60 0 % 0

Restore Default Open Profile... ☒ Long ☐ Short Open Result

Save Profile Save Result

Save Profile As... Analyze Save Result As...

☒ Select All Stocks Reset

Sort by Alphabetic

OK

Move as analyzed stocks

Two parameters are required for the Re-tracement Analysis.

Up/Down Trend Period: The Up/Down Trend period is the period that the price trend is up/down. The recognition of the up/down trend is from the Support/Resistance indicator, depending whether Long Analysis or Short Analysis is selected.

Retrace Period: The Retrace period is the period that the price trend is down/up but is regarded as a re-tracement during the up/down trend. The recognition of the re-tracement is from the Resistance/Support indicator, depending whether Long Analysis or Short Analysis is selected.

Re-tracement Analysis

Charting Analysis

Volume Change: This is to confirm reverse from the retracement when volume is picking up. You can specify how much the volume change should be in order to confirm the reverse and the period in which the total volume is compared to the current volume. The default period is 10.

Moving Average: This is to confirm that the current close price is above the moving average. You can specify whether the close prices in the previous period are below the moving average. This is to scan the stocks that have just reversed. The default period is 0.

Sharechart

Bottom/Top Analysis

11.9 BOTTOM/TOP ANALYSIS

(This feature is for professional users only)

Bottom/Top Analysis is used to analyze stocks that have formed a bottom/Top pattern and have broken the bottom/top trend. The length of the bottom/top and the falling/rising period before the bottom/top are provided as parameters in the Bottom/Top Analysis dialog box so that the user can modify the parameters according to his/her expectations about the bottom/top.

To use bottom/top analysis, go to Charting analysis < Bottom/Top. The following Bottom/Top Analysis dialog box will appear.

Three parameters are required for the Bottom/Top Analysis.

Price Falling/Rising Period: The Price falling/rising period is the period that the price trend is down/up.

Bottom/Top Period: The Bottom/Top period is the period that the price has reached its bottom/Top and is going sideways.

Price Rising/Falling Period: The Price rising/falling period is the period that the price breaks its bottom/top trading range and is trending up/down.

Bottom/Top Analysis analyzes stocks that have come out of the bottom/top and are in the up/down trend. The bottom/top breakout is confirmed by comparing the volume of the analyzed date with the average of the previous three days. If the volume of the analyzed date is greater than the average of the previous three days, the bottom/top is confirmed.

11.10 REVERSAL ANALYSIS

(This feature is for professional users only)

Reversal analysis is used to analyze stocks that form any of the six common types of short-term reversals on the analysis date. They are closing price reversal, open/close reversal, key reversal, hook reversal, island reversal, and pivot point reversal. The prerequisite for the short-term reversal is the trend period. In the short-term reversal analysis dialog box, you can decide the number of trending days. You can also select which type of short-term reversal to be involved in the analysis by ticking the appropriate check box.

To use short-term reversal analysis, go to Charting analysis < Reversals. The following Reversal Analysis dialog box will appear.

Two parameters are required for the Short-term Reversal Analysis.

Short-term Reversal Type: Select the type of short-term reversal in the analysis.

Trend Period: The trend period is the period that the price has been trending.

The short-term reversal analysis identifies short-term reversals based purely on the closing price relative to its price components and its previous price components. It does not involve the volume confirmation. When you see the reversal signal on the chart, you should carry out further analysis on its price pattern, trend lines, and appropriate indicators. The reversal signals are plotted on the chart as one of the indicators. Therefore, you can show reversal points on the chart by selecting "Short-term Reversals" from the

Reversal Analysis

indicator dropdown box on the Stock Selection Bar. The letter on each reversal signal represents the first letter of the reversal type. For example, reversal signal with letter 'p' indicates a pivot point reversal. The following is the list of short-term reversals and corresponding symbols on the chart:

Reversal Points

Short-term Reversal	Symbol on chart
Key reversal	k
Open close reversal	o
Closing price reversal	c
Hook reversal	h
Pivot point reversal	p
Island reversal	i

Sharechart

11.11 CANDLESTICK REVERSAL PATTERN ANALYSIS

Candlestick reversal pattern analysis is based on Japanese Candlestick reversal patterns: Doji, shooting star, morning star, evening star, hammer, hanging man, dark cloud cover, piercing line, and engulfing patterns. The prerequisite for the short-term reversal is the trend period. In the candlestick reversal pattern analysis dialog box, you can decide the number of trending days. You can also select which candlestick reversal pattern to be involved in the analysis by ticking the appropriate check box.

To use candlestick reversal pattern analysis, go to Charting analysis < Candlestick Reversal Patterns menu item. The following Candlestick Reversal Pattern Analysis dialog box will appear.

Two parameters are required for the Candlestick Reversal Pattern Analysis.

Candlestick Reversal Pattern Type: Select the candlestick reversal pattern in the analysis.

Trend Period: The trend period for the reversal pattern to be valid.

The candlestick reversal pattern analysis identifies reversals based purely on candlestick theory. It does not involve the volume confirmation. When you see the reversal signal on the chart, you should carry out further analysis on its price pattern, trend lines, and appropriate indicators. The reversal patterns are plotted on the chart as one of the indicators. Therefore, you can show reversal points on the chart by selecting "Candlestick Reversal Patterns" from the indicator dropdown box on the Stock Selection

Candlestick Analysis

Charting Analysis

Bar. The letter on each reversal signal represents the first letter of the reversal pattern. The following is the list of patterns and corresponding symbols on the chart:

Candle Stick Reversal Pattern

Candlestick Reversal Pattern	Symbol on chart
Doji	d
Hammer	h (in the down trend)
Inversed Hammer	H (in the upper trend)
Hanging man	h (in the up trend)
Shooting star	s
Morning star	m
Evening star	e
Dark cloud cover	D
Piercing line	P
Engulfing pattern	E

Advanced Indicator Analysis Charting Analysis

11.12 ADVANCED INDICATOR ANALYSIS

(This feature is for professional users only)

Advanced Indicator Analysis allows you to analyze shares based on almost all popular indicators in ShareChart. With Advanced Indicator Analysis, you will be able to compare any indicator with any other indicator at your choice.

To use the Advanced Indicator Analysis, go to Charting Analysis < Advanced Indicators. The following Advanced Indicator Analysis dialog box will appear:

Advanced Indicator Analysis - AUSTRALIA\scan\SpAdvancedIndicator.scn

ctions based on the charting analysis results. It is recommended that further research and/or consultati

Watch Folders: [Dropdown]
Preselected: All Stocks [Dropdown]
Stocks: [List Box]

Data Range
Dates: 24/09/2007 - 24/09/2007 Chart Category: Daily [Dropdown]
Price: 0.1 - 0 Trades: 0 - 0
Volume: 50000 - 0 Value: 0 - 0

Indicator 1
Stop Loss
Linear Regression
Moving Average
ATR Trailing Stop Loss
Bollinger Band
Keltner Bands - ATR
Mike Base Channels
Moving Average % Channel
MACD Histogram
Elliott Wave Oscillator

Indicator 2
William's % R
Price Cluster
Stop Loss
Linear Regression
Moving Average
ATR Trailing Stop Loss
Bollinger Band
Keltner Bands - ATR
Mike Base Channels
Moving Average % Channel

Compare
> [Dropdown]
Value: 1 [Text] % [Checked]
By Periods: 0 [Text]
Within Periods: 3 [Text]

Period: 10 [Text]
Type: Simple [Dropdown]

Period: 0 [Text]
Type: Simple [Dropdown]

Sort by: Alphabetic [Dropdown]

Buttons: Open Profile..., Save Profile, Analyze, Open Result, Save Result, Save Profile As..., Save Result As..., Reset, Restore Default, OK

Apart from common parameters and operation procedures for all analyses, the following parameters and operation procedures to Indicator Analysis are described.

Indicator 1: Indicator 1 list box list all indicators that can be used to compare with indicators in Indicator 2 list box.

Indicator 2: Indicator 2 list box list all indicators that will be compared by indicators in Indicator 1 list box.

Compare: The comparison operator that is used to compare Indicator 1 with Indicator 2.

Value: How much difference used to compare the two indicators. For example, value of 0.2 with compare operator ">" selected indicates that Indicator 1 be greater than Indicator 2 by at least 0.2. Value of 3 with compare operator ">" selected and "%" checkbox ticked indicates that Indicator 1 be greater than Indicator 2 by at least 3%.

Advanced Indicator Analysis Charting Analysis

By Periods: The number of periods that can be used to compare with Indicator 2. The Periods should be consistent with the Chart Category selected. For example, weekly is selected in the Chart Category dropdown box, the periods will be in weeks. When weekly is selected, you can compare moving average 1 with moving average 2 three weeks ago by entering 3 in the "By Periods" edit field.

Within Periods: The periods that the scan criteria are met. If the scan criteria are not met at anytime within the "within periods", the stock will not be picked up. The Within Periods should be consistent with the Chart Category selected. For example, weekly is selected in the Chart Category dropdown box, the Within Periods will be in weeks.

Period: Periods under each indicator listbox are for selected indicators. If an indicator without a period parameter is selected, this box will be grayed.

Type: Types under each indicator listbox are for selected indicators. If an indicator without a type parameter is selected, this box will be grayed.

With Advanced Indicator Analysis, you can perform complicated charting analysis. The following are some of examples.

Example 1: I want to scan for stocks with closing price 1% above 60 simple moving average that happens within the last 3 days (indicator analysis). The following are the parameters.

- Select Close from Indicator 1 listbox
- Select > from Compare dropdown box
- Enter 1 in Value box, and tick "%" checkbox
- Enter 0 in the By Periods box
- Enter 3 in Within Periods box
- Select Moving Average from Indicator 2 listbox
- Under Indicator 2 listbox, enter 60 in Period field, and select Simple from the Type dropdown box.

Example 2: I want to scan for stocks with 60 days exponential moving average up crossing 260 days simple moving average within the last 3 days (indicator crossing analysis). The following are the parameters.

- Select Moving Average from Indicator 1 listbox
- Under Indicator 1 listbox, enter 60 in Period field, and select Exponential from the Type dropdown box.
- Select > from Compare dropdown box
- Enter 0 in Value box, and untick "%" checkbox
- Enter 0 in the By Periods box
- Enter 3 in Within Periods box
- Select Moving Average from Indicator 2 listbox
- Under Indicator 2 listbox, enter 260 in Period field, and select Simple from the Type dropdown box.

Example 3: I want to scan for stocks with current volume that is 200% greater than volume 5 days ago (volume analysis). The following are the parameters.

- Select Volume from Indicator 1 listbox
- Select > from Compare dropdown box
- Enter 100 in Value box, and tick "%" checkbox
- Enter 5 in the By Periods box

Advanced Indicator Analysis Charting Analysis

- Enter 0 in Within Periods box
- Select Volume from Indicator 2 listbox

Example 4: I want to scan for stocks with current low that is greater than previous high (Gap Analysis). The following are the parameters.

- Select Low from Indicator 1 listbox
- Select > from Compare dropdown box
- Enter 0 in Value box, and untick "%" checkbox
- Enter 1 in the By Periods box
- Enter 0 in Within Periods box
- Select High from Indicator 2 listbox

Unlike Indicator Analysis, you can only analyze one indicator at a time. To perform multiple indicator analyses, you must use "Reassign for further analysis" button to reassign analyzed stocks in the "Analyzed Stocks" listbox to the "Stocks" listbox for another indicator analysis.

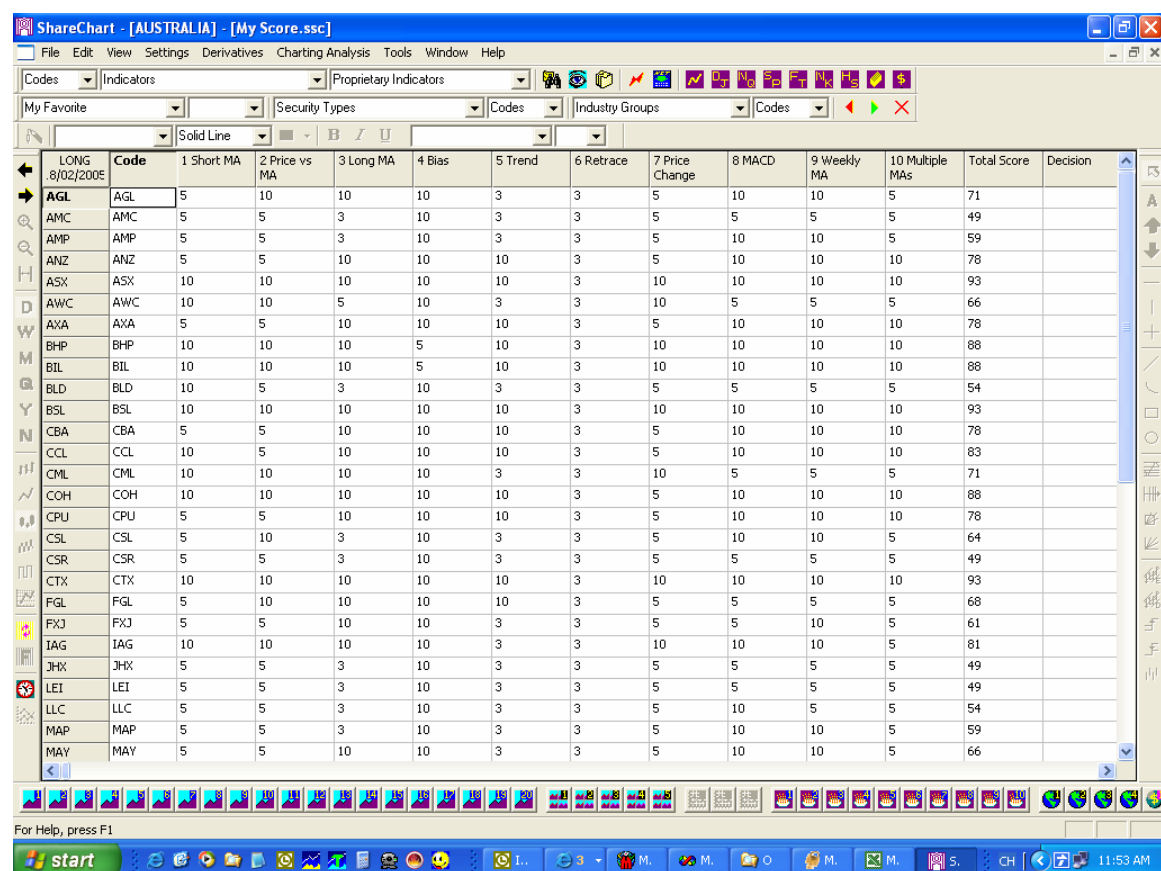
Sharechart

11.13 SCORE SYSTEM

(This feature is for professional users only)

Sharechart provides you a score system that will allow you to score stocks according your predefined score criteria. The stocks with the high score will be considered as high potential for capital appreciation for long positions or capital depreciation for short positions. The score system is based on the experience of professional traders and experts. The scores for each security are the comparison mechanism to compare the strength of a security to others based on the predetermined indicators. The higher score implies the stronger strength and hence becomes the higher priority in your trading list.

The Score System can be found under Charting Analysis < Score System. The following screen will appear.



LONG 8/02/2006	Code	1 Short MA	2 Price vs MA	3 Long MA	4 Bias	5 Trend	6 Retrace	7 Price Change	8 MACD	9 Weekly MA	10 Multiple MAs	Total Score	Decision
AGL	AGL	5	10	10	10	3	3	5	10	10	5	71	
AMC	AMC	5	5	3	10	3	3	5	5	5	5	49	
AMP	AMP	5	5	3	10	3	3	5	10	10	5	59	
ANZ	ANZ	5	5	10	10	10	3	5	10	10	10	78	
ASX	ASX	10	10	10	10	10	3	10	10	10	10	93	
AWC	AWC	10	10	5	10	3	3	10	5	5	5	66	
AXA	AXA	5	5	10	10	10	3	5	10	10	10	78	
BHP	BHP	10	10	10	5	10	3	10	10	10	10	88	
BIL	BIL	10	10	10	5	10	3	10	10	10	10	88	
BLD	BLD	10	5	3	10	3	3	5	5	5	5	54	
BSL	BSL	10	10	10	10	10	3	10	10	10	10	93	
CBA	CBA	5	5	10	10	10	3	5	10	10	10	78	
CCL	CCL	10	5	10	10	10	3	5	10	10	10	83	
CML	CML	10	10	10	10	3	3	10	5	5	5	71	
COH	COH	10	10	10	10	10	3	5	10	10	10	88	
CPU	CPU	5	5	10	10	10	3	5	10	10	10	78	
CSL	CSL	5	10	3	10	3	3	5	10	10	5	64	
CSR	CSR	5	5	3	10	3	3	5	5	5	5	49	
CTX	CTX	10	10	10	10	10	3	10	10	10	10	93	
FGL	FGL	5	10	10	10	10	3	5	5	5	5	68	
FXJ	FXJ	5	5	10	10	3	3	5	5	10	5	61	
IAG	IAG	10	10	10	10	3	3	10	10	10	5	81	
JHX	JHX	5	5	3	10	3	3	5	5	5	5	49	
LEI	LEI	5	5	3	10	3	3	5	5	5	5	49	
LLC	LLC	5	5	3	10	3	3	5	10	5	5	54	
MAP	MAP	5	5	3	10	3	3	5	10	10	5	59	
MAY	MAY	5	5	10	10	3	3	5	10	10	5	66	

As shown in the above figure, all you need to do is to type the stock code in Code column and hit ENTER. The scores for each indicator item will be calculated automatically together with the total score information. The last column is the Decision column that is used to record your trading decision. You can write any informative description in the Decision column.

To sort any column (e.g. Total Score column), you can simply right click on the column and select "Sort Ascending" or "Sort Descending".

You can re-size each column or row if the information does not fit in a cell. To re-size a column, point to the title row of the spreadsheet. When the cursor changes to a horizontal two-side arrow, drag the cursor and you will see the column size changes.

Score System

Charting Analysis

Similarly, to resize a row, point the title column of the spreadsheet. When the cursor changes to a vertical two-size arrow, drag the cursor and you will see the row size changes.

You can save the current score system, or save the current score system to a different file name. In this way, you can create as many score systems as you wish. To do this, simply right click on any portion of the spreadsheet and select the standard Open, Save and Save As commands from the popup menu.

All score system files are mandated with a file extension ".ssc". If you save your score system using a different extension, ShareChart will change your extension to ".ssc". If you save your score system without an extension, ShareChart will append the extension ".ssc".

If you select 'New' menu item from the popup menu, all the current contents in the score system will be cleared to allow you to create a new score system. Make sure that you save your current score system before you select the new command.

In the score system spreadsheet, you can also add a new row, insert or delete a row. To insert a row, first left click the row that you want to insert before. Then right click to bring up the popup menu and select the Insert Row command.

Similarly, to delete a row, first left click the row that you want to delete. Then right click to bring up the popup menu and select the Delete Row command.

When the Score System spreadsheet opens, it load the last saved codes and decisions and fill score information with the last trading date data. The date information along with "Long" score system type is displayed on the top-left corner. If the last date price does not match the last trading date, the score will not be calculated. This could happen if you do not download data regularly.

You can toggle the score system type between Long and Short by selecting View < Long menu item. Please note that date for Long or Short Score System can be different.

To change the settings for the Score System, you can select Settings < Score System Settings. The following dialog box will appear.

Score System

Score System Settings

Long Short

Date: 22/07/2007

Item	Parameter	Up	Even	Down
1.	6 Days Moving Average is:	10	8	5
2.	Last closing price is compared to 6 Days Moving Average:	10	8	5
3.	18 Days Moving Average is:	10	5	3
4.	6 Days Bias Indicator is:	10	5	3
5.	14 Days Regression is:	10	5	3
6.	Prices 3 days ago retraced for 14 days:	10	5	3
7.	Last closing price is above the top candlestick body of price with volume > 100 % of 2 days ago: Yes	10		5
8.	MACD is:	10	8	5
9.	3 weeks Weekly MA is above 6 weeks Weekly MA and 13 weeks Weekly MA is up: Yes	10		5
10.	6 days Daily MA is above 18 days Daily MA and 18 days Daily MA is up: Yes	10		5

OK Cancel

In the above dialog box, you can change the score of each item. The numbers correspond to the numbers in the spreadsheet. For example, in the Long Score System, you may change item 6 as "If prices 3 days ago, in 14 days, had retraced more than 25% is scored as 10, more than 10% as 5, and less than 10% as 3. The scores of column "6 Retrace" in the spreadsheet will be updated correspondingly.

You can change all parameters in the editable boxes to find out the most appropriate parameters according to your trading style and methodologies. The following are the interpretations for each line in the Long Score System Settings dialog box.

1. If 6 days moving average is going up, score 10; sideways, score 8; going down, score 5.
2. If the last closing price is above 6 days moving average, score 10; equal, score 8, below, score 5.
3. If 18 days moving average is going up, score 10; sideways, score 5; going down, score 3.
4. If 6 days Bias Indicator is less than 3, score 10; between 3 and 5, score 5; more than 5, score 3.
5. If last 14 days show up trend (measured by linear regression), score 10; sideways, score 5; down trend, score 3.
6. If prices 3 days ago had retraced for 14 days, and retraced more than 25%, score 10, between 10% and 25%, score 5; less than 10%, score 3.
7. If last closing price is above the top of previous candlestick body with volume 100% more than the volume 2 days ago, score 10; otherwise, score 5.
8. MACD with periods 24 and 14 is above 0, score 10; at 0, score 8; below 0, score 5.
9. 3 weeks weekly moving average is above 6 weeks weekly moving average and 13 weeks weekly moving average is going up, score 10; otherwise, score 5.

Score System

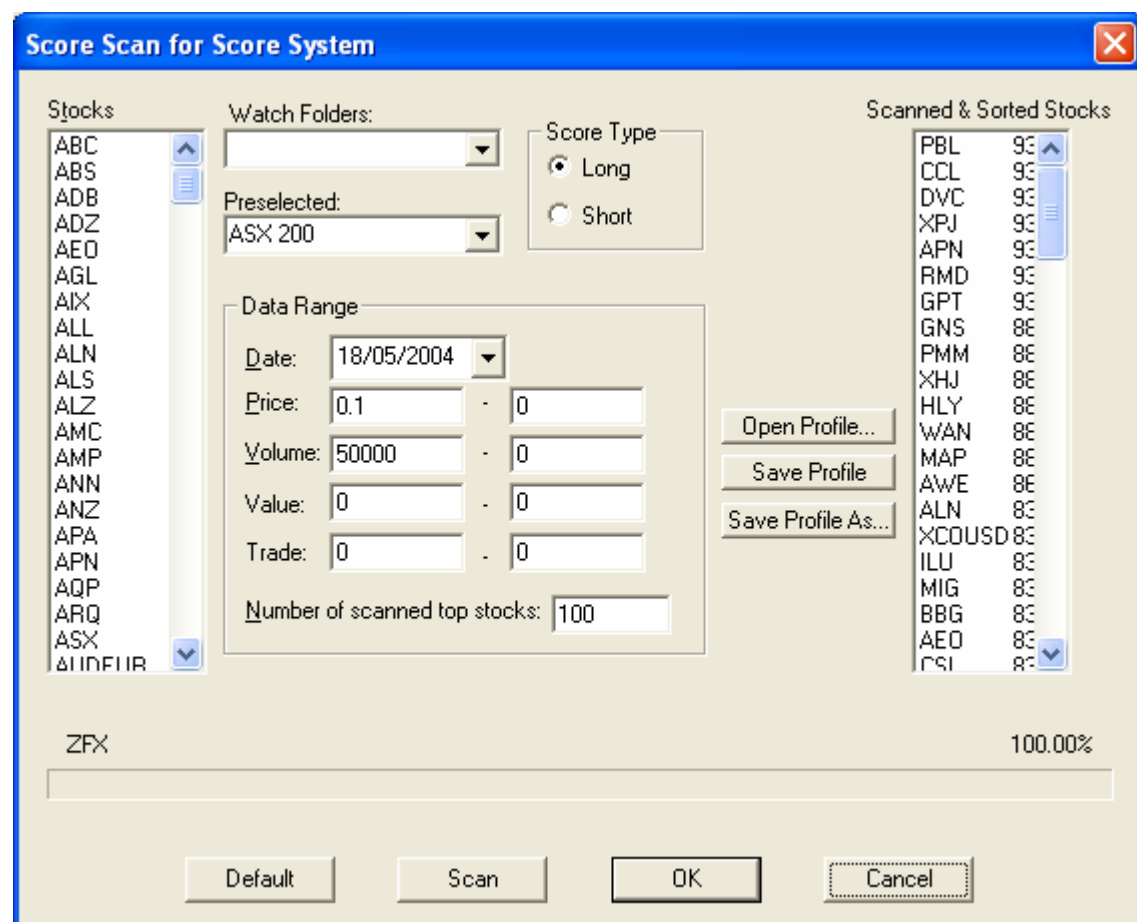
10. 6 days daily moving average is above 18 days daily moving average and 18 days daily moving average is going up, score 10; otherwise, score 5.

Similar interpretations can be drawn for each line in the Short Score System Settings dialog box.

The date in the settings dialog box will be default to the date in the spreadsheet when you open the dialog box. You can change to another date. The changed date will be displayed on the top left corner of the Score System spreadsheet, and the score system will be updated for the changed date.

When you have finished defining scores, click "OK" button. The scores in the Score System spreadsheet will be updated accordingly. You can, of course, abandon the changes by selecting "Cancel" button.

You can scan the whole market for the highest scores. While you are in the Score System, select Charting Analysis < Scan Market for Score System. The following dialog box will appear.



The dialog box titled "Score Scan for Score System" contains the following elements:

- Stocks List:** A scrollable list of stock tickers including ABC, ABS, ADB, ADZ, AEO, AGL, AIX, ALL, ALN, ALS, ALZ, AMC, AMP, ANN, ANZ, APA, APN, AQP, ARQ, ASX, and AINDFIR.
- Watch Folders:** A dropdown menu.
- Preselected:** A dropdown menu showing "ASX 200".
- Score Type:** Radio buttons for "Long" (selected) and "Short".
- Data Range:** Fields for Date (18/05/2004), Price (0.1), Volume (50000), Value (0), and Trade (0).
- Number of scanned top stocks:** A field set to 100.
- Scanned & Sorted Stocks:** A list of scanned stocks with their scores, including PBL (93), CCL (93), DVC (93), XPJ (93), APN (93), RMD (93), GPT (93), GNS (88), PMM (88), XHJ (88), HLY (88), WAN (88), MAP (88), AWE (88), ALN (83), XCOUSD (83), ILU (83), MIG (83), BBG (83), AEO (83), and CSI (83).
- Buttons:** "Open Profile...", "Save Profile", "Save Profile As...", "Default", "Scan", "OK", and "Cancel".
- Status Bar:** Displays "ZFX" and "100.00%".

Fields in the above dialog box are explained as follows.

Stocks List box: Stocks that are to be participated in the scan. The list will amend to the selections you make from the "Watch List" or "Pre-selected" Stocks groups on the right.

Date: involved in the scan based on which scores are calculated.

Score System

Charting Analysis

Price: Closing price range for stocks involved in the scan. A zero value in the upper band of the price range will indicate there is no upper price limit for stocks. The price range allows you to filter some stocks from the analysis. For example, [0.1, 0] will indicate that you only want stocks with a close price of more than 10 cents to be involved in the analysis.

Volume: Volume range for stocks involved in the analysis. A zero value in the upper band of the volume range will indicate there is no upper volume limit for stocks. The volume range allows you to filter some stocks from analysis. For example, [50,000, 0] will indicate that you only want stocks with a trading volume of more than 50,000 to be involved in the analysis.

Trade: Number of trades range for stocks involved in the analysis. A zero value in the upper band of the trades range will indicate that there is no upper trades limit for stocks. The trade's range allows you to filter out some stocks from analysis. For example, [10, 0] will indicate that you only want stocks with a number of trades more than 10 to be involved in the analysis.

Value: Value range for stocks involved in the analysis. A zero value in the upper band of the value range will indicate that there is no upper value limit for stocks. The value range allows you to filter some stocks from the analysis. For example, [10,000, 0] will indicate that you only want stocks with a trading value of more than \$10,000 to be involved in the analysis.

Watch List: This dropdown box contains all the watch lists. You can perform analysis on your own pre set watch lists, e.g. My Favorite, My Watch etc. This box also contains the Platinum pre set stock groups within the U.S.A Market.

Pre-selected Stocks: This dropdown box contains the lists of pre-selected stocks. For the Australia market, they are Optionable stocks, ASX 20, ASX 50, ASX 100, ASX 200, ASX 300, ASX All Ordinaries, and ASX Small Ordinaries. For the USA market, they are Optionable stocks, S&P 100, S&P 500, S&P 1000, S&P 1500, S&P Mid Cap 400, and S&P Mid Cap 600.

When you have filled all relevant fields, click the Scan button to start the scan. The scan process will normally take a few minutes depending on the speed of your PC and the size of the group of stocks you have selected to scan. During scan process, the Scanned & Sorted Stocks list box will show progressively the scanned stocks.

When the scan is complete, a message box will inform you the completion of the scan. Click the OK button to return to the scan dialog box. The stocks in the Scanned & Sorted Stocks list box will be sorted in descending order by total scores.

Once you click on the OK button, ShareChart will return to the Score System Spreadsheet window that will be updated with the scanned stocks according to the scan type (long or short) and scan date, where you can see more detailed scores for each criterion. The update time will depend on the size of scanned stocks.

You can open the saved scan file using the "Open Profile" button. You can also save the scan profile to a different file using the "Save Profile As" button. If you want to save the current scan settings, select "Save Profile" or "Save Profile As" button. If you do not save the settings, ShareChart will revert them to default when you open the scan dialog box again.

11.14 TRADING SYSTEM TESTING

You may consider establish your trading system using the criteria set in charting analyses. For this purpose, Sharechart provides you a trading system testing that will allow you to back test your criteria set in charting analysis for a stock. For example, you may want to test the performance of criteria set in Indicator Analysis for stock BHP.

The Trading System Testing can be found under Charting Analysis < Trading System. The following screen will appear.

Trading System Testing

Stock Code: Initial Capital: Start Date: Commission Rate %: Minimum Commission \$:

Entry Profile:

Exit Profile:

Stop Loss Profile:

Performance History

Date	Trading	Price	Qty	Credit/Debit	Profit	Total Profit

Performance Summary

Days Tested:

Total Entries:

Total Exits:

Total Stoplosses:

Total Cost:

Total Revenue:

Total Profit:

Return On Capital (%):

In the above dialog box, you will need to enter a stock code for testing, an initial capital and start date. The default starting date is set to be 10 years from the current date. You can set the commission rate as percentage of trade value and minimum commission required.

Entry Profile is one of the charting analysis profile saved from Charting Analyses. Likewise, the exit and stop loss profiles are charting analysis profiles. If your entry profile is for long, then your exit and stop loss profiles must be of short type, and vice versa.

You can save the current trading system setting as Trading System profile by clicking either Save profile or Save Profile As... button. Of course, you can open a saved trading system profile by clicking Open Profile button.

To perform the back testing, simply click Test button. The performance history will be displayed with each entry and exit (or stop loss if its criteria are met first), as shown below.

Trading System

Charting Analysis

Trading System Testing

Stock Code: Initial Capital: Start Date: Commission Rate %: Minimum Commission \$:

Entry Profile:

Exit Profile:

Stop Loss Profile:

Performance History

Date	Trading	Price	Qty	Credit/Debit	Profit	Total Pr
5/01/1998	LONG	14.32	690	-9,989.49		
13/01/1998	Stoploss	13.35	690	9,110.17	-879.32	-879.32
27/01/1998	LONG	13.87	650	-9,114.67		
6/05/1998	Stoploss	14.49	650	9,316.18	201.51	-677.80
13/07/1998	LONG	14.06	655	-9,308.62		
4/08/1998	Stoploss	13.82	655	8,951.23	-357.39	-1,035.1
27/10/1998	LONG	13.34	664	-8,953.85		
3/12/1998	Stoploss	12.00	664	7,880.35	-1,073.50	-2,108.6
25/02/1999	LONG	12.36	631	-7,884.95		
1/09/1999	Stoploss	17.61	631	10,989.05	3,104.10	995.41
22/09/1999	LONG	18.02	603	-10,985.59		
27/09/1999	Stoploss	17.51	603	10,442.39	-543.20	452.21
22/11/1999	LONG	18.53	557	-10,434.74		
8/02/2000	Stoploss	19.00	557	10,466.59	31.85	484.06
6/04/2000	LONG	18.85	550	-10,481.54		
15/05/2000	Stoploss	17.10	550	9,301.55	-1,180.00	-695.94
15/06/2000	LONG	18.46	498	-9,294.20		

Performance Summary

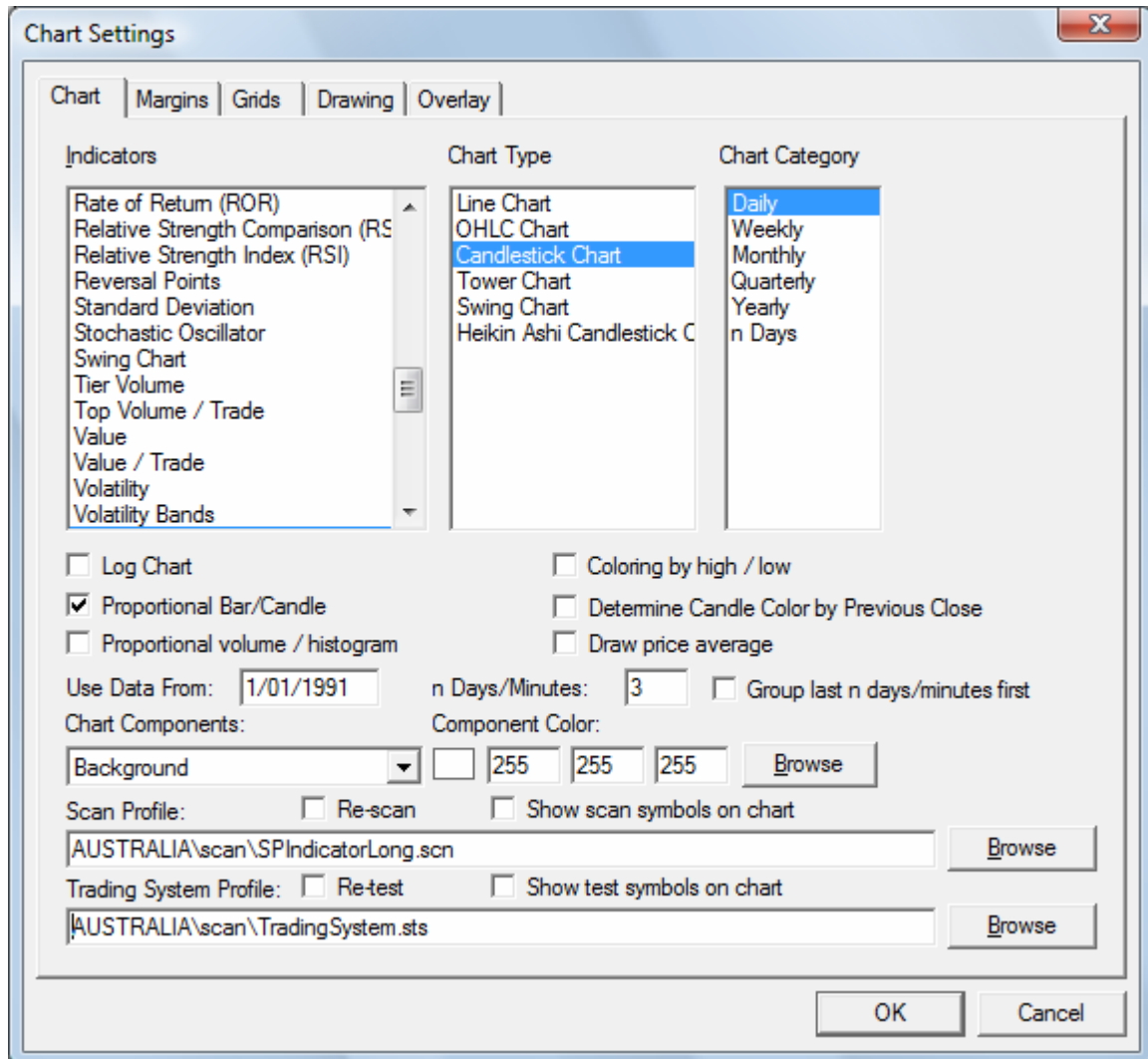
Days Tested:	2,626
Total Entries:	32
Total Exits:	0
Total Stoplosses:	31
Total Cost:	311,541.02
Total Revenue:	301,573.74
Total Profit:	4,979.70
Return On Capital (%):	49.80

For each line of the performance history, it will show the trading date, trading type (entry, exit, or stop loss), trading price, trading volume, credit/debit, profit, total profit, and Return on Capital (ROC) as percentage. If the total profit is negative and its value closes to capital, it indicates failure (ROC closes to -100%) and the testing will stop.

Finally, the Performance Summary shows the total of all trading history.

11.15 DISPLAY CHARTING ANALYSIS OR TRADING SYSTEM ON CHART

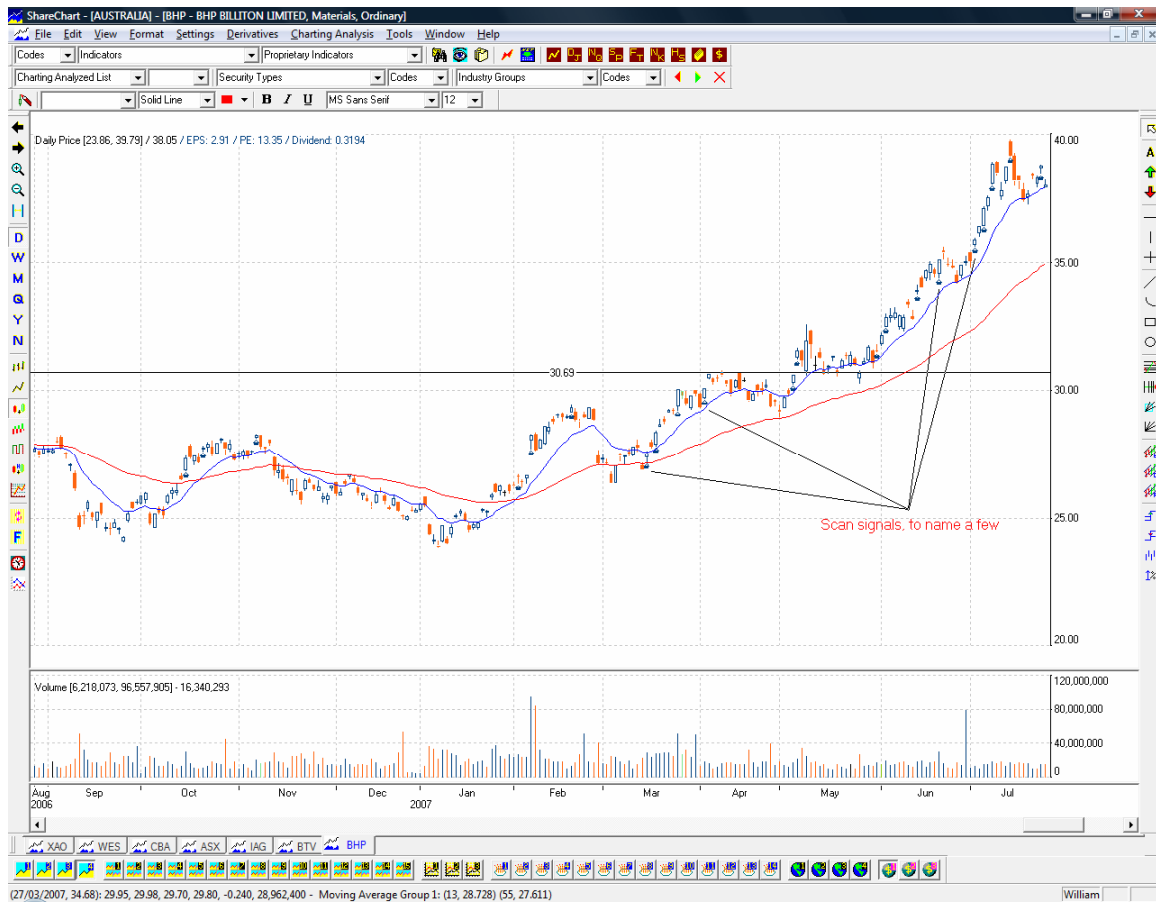
With ShareChart, you can display charting analysis or trading system on a chart. All you need to do is to save your charting analysis or trading system profile, and include them into your chart settings, as shown below.



With Scan (charting analysis) Profile, you can show the scan symbols on chart. If your scan is long type, it shows up arrow. Otherwise, it shows down arrow. If you change a scan profile, you must tick Re-scan checkbox to allow new scan profile being recalculated. An example of the scan symbol display is shown in the following figure.

Display on Chart

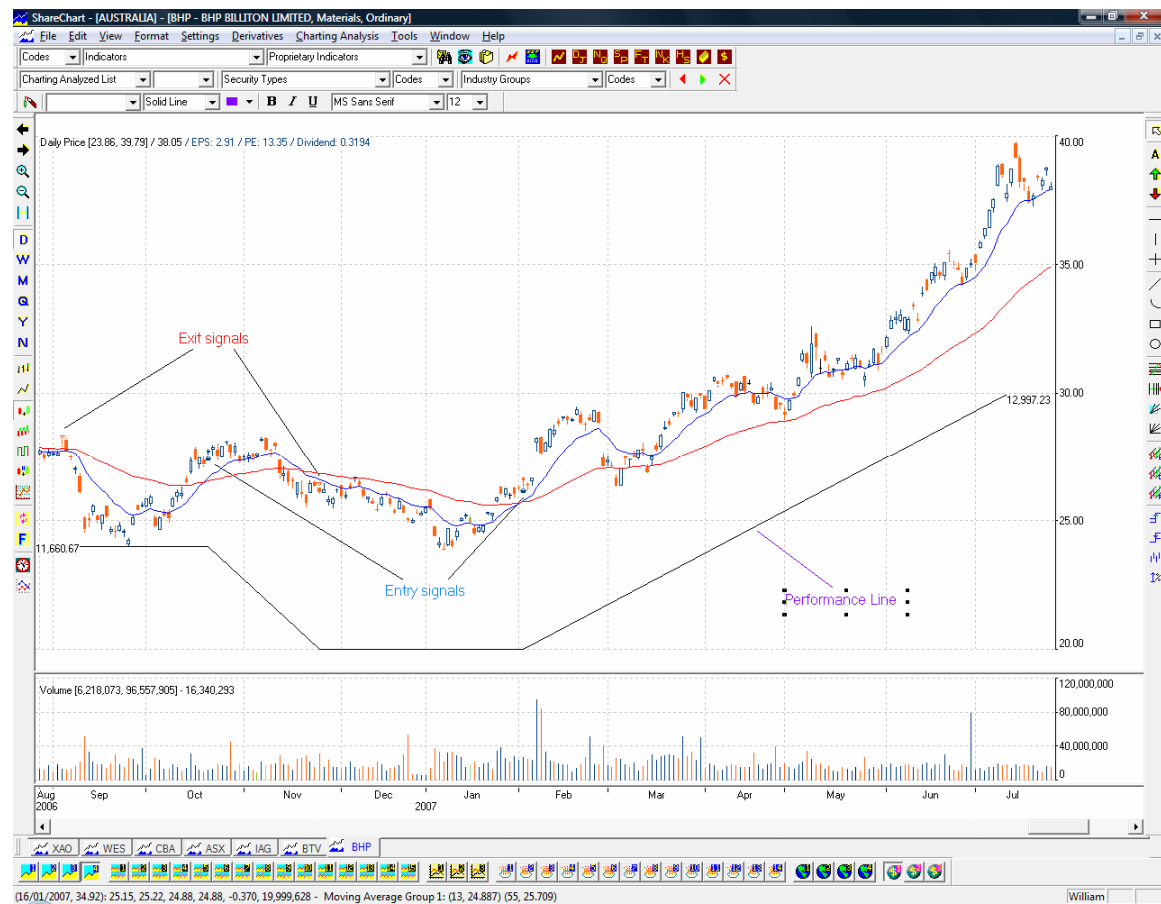
Charting Analysis



With Trading System Profile, you can show the trading symbols on chart. The trading symbols are drawn with a triangle followed by a solid rectangle. On the bottom of the chart, a solid line shows the capital accumulation for each trading activity. It is also a performance line showing the performance of the trading system, as shown below.

Display on Chart

Charting Analysis



11.16 TRADING SYSTEM SCAN

Trading System Scan will allow you to scan through different combinations of charting analysis profiles to generate a trading system that achieves the maximum return on your investment.

The Trading System Scan can be found under Charting Analysis < Trading System Scan. The following screen will appear.

Trading System Scan

Stock: Initial: Start: Commission Rate: Minimum Commission:

Entry	Exit	Stop Loss
1 - SpCross5_20long	1 - SpIndicator10Short	
2 - SpCross20_60long	2 - Sar6Short	
3 - SpStochastic14Long	3 - Sari4Short	

Buttons: Add, Delete (for each list)

Performance Summary

System	Days	Entries	Exits	Stoplosses	Revenue	Cost	Profit	ROC
2, 2	2, 531	24	24	0	273,136.00	271,111.59	2,024.42	20.4
3, 1	2, 531	3	3	0	34,740.73	34,156.33	584.40	5.8
3, 2	2, 531	3	3	0	30,043.68	30,437.71	-394.03	-3.9
3, 3	2, 531	3	3	0	29,388.87	30,191.97	-803.10	-8.0
2, 3	2, 531	25	25	0	256,096.88	257,816.70	-1,719.83	-17.2
2, 1	2, 531	21	21	0	148,107.27	152,819.60	-4,712.32	-47.1
1, 2	2, 531	71	71	0	508,077.40	513,506.72	-5,429.32	-54.2
1, 1	2, 531	36	36	0	285,838.81	291,268.49	-5,429.68	-54.2
1, 3	2, 531	65	65	0	436,061.95	445,297.83	-9,235.88	-92.3

Buttons: Open Profile..., Save Profile, Save Profile As..., Scan, Close

In the above dialog box, you will need to enter a stock code for testing, an initial capital and start date. The default starting date is set to be 10 years from the current date. You can set the commission rate as percentage of trade value and minimum commission required.

Entry Profile is one of the charting analysis profile saved from Charting Analyses. Likewise, exit and stop loss profiles are charting analysis profiles. If your entry profile is for long, then your exit and stop loss profiles must be of short type, and vice versa.

Each time you add an entry, exit, or stop loss profile, the profile is numbered sequentially in their corresponding list box. This will allow the scanner to show each combined trading system in the Performance Summary view.

You can save the current trading system scan setting as trading system scan profile by clicking either Save profile or Save Profile As... button. Of course, you can open a saved trading system scan profile by clicking Open Profile button.

To perform scan, simply click the Scan button. The scan time depends on the number of entry, exit, and stop loss profiles that you have added. After the scan is complete, Performance Summary window will show all the combinations of scan profiles with performance items. To rank the performance on each item, simply click on their corresponding column headers. For example, you can click on Profit header to rank the

Trading System Scan

Charting Analysis

profits for the scanned trading systems. By ranking profits in descending order, you will find out which trading system performs best in term of profitability.

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CHAPTER 12 DERIVATIVES

12.1 INTRODUCTION

Derivatives have become more and more popular among traders and investors as a useful instrument for leverage and hedging. Popular derivatives are options, warrants, and futures. Recognizing the need for tools in analyzing the derivatives, ShareChart has offered the Options sorter and other tools.

12.2 OPTIONS SORTER

The Option Sorter is used to bring up all the different options for a particular stock.

To open the option sorter go to Derivatives < Option Sorter. A screen like the one below will appear. In the space available insert the code of the stock you wish to view option data on. Then hit Scan and the data will appear. You must keep both the Puts and Calls boxes ticked for the initial scan.

Option Sorter

Stock Code:

Options

Option Type:
☒ Calls ☒ Puts

Sort By:
☐ Option Code
☒ Expiry Date
☐ Exercise Price
☐ Last Price
☐ Volume
☐ Intrinsic Value
☐ Time Value
☐ Option/Stock Price Change

Underline Price
 Open: 12.56
 High: 12.73
 Low: 12.56
 Close: 12.73
 Volume: 8,050,239

Options List:

- NCPVN - 12.00 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCPVM - 14.00 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCP2A - 10.00 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCP2B - 10.50 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCP2C - 11.00 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCP2D - 14.50 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCPVK - 13.00 LOCAL PUT OPTION EXPIRING 25-Sep-03
- NCP1G - 13.00 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCPW1 - 0.01 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP5D - 12.00 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP5E - 12.50 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP3H - 15.00 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP3B - 11.00 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP3K - 15.50 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP5B - 11.00 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP5A - 10.50 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP1T - 14.50 LOCAL CALL OPTION EXPIRING 30-Oct-03
- NCP6A - 10.50 LOCAL PUT OPTION EXPIRING 30-Oct-03
- NCP6B - 11.00 LOCAL PUT OPTION EXPIRING 30-Oct-03
- NCP2T - 14.50 LOCAL PUT OPTION EXPIRING 30-Oct-03
- NCP6C - 11.50 LOCAL PUT OPTION EXPIRING 30-Oct-03
- NCP6D - 12.00 LOCAL PUT OPTION EXPIRING 30-Oct-03

Additional Option Information

Issuer Name: NEWS
 Industry Group: Consumer
 Industry Subgroup: Media
 First Traded:
 Delivery Type: PHYS
 Exercise Type: American
 Underline Product Type: Equity
 Shares per Contract: 1000
 Open Interest:

Last Price Information

Date: 24/09/2003 Time:
 Open: 0.920 Close: 0.915
 High: 0.940 Low: 0.905
 Volume: 79

Calculated Information

Intrinsic Value: 0.730
 Time Value: 0.185
 Option/Stock Price Change: 0.661

Scan Cancel

You can tick either Puts or Calls making it possible to see only Puts or Calls data, or both. The order of the data can also be varied, by ticking any one of the boxes within the 'Sort By' column. This enables you to quickly search through the contracts efficiently.

The Underline price box shows you price and volume data for the Stock at the last time you downloaded data for the particular stock. Within the options box the different colors are keys to 'in the money' and 'out of the money' contracts, with Green representing 'in the money' and red representing 'out of the money' contracts respectively.

Once you have sorted your options and found the contract you want highlighting it will bring up some Additional Option Information.

Option Sorter

Derivatives

This additional information can be seen within the table to the right of the options data. It provides you with some general information about the company and about the option contract itself. Such as the industry and Industry Subgroup, you can also see how many shares per contract and what the open interest is for the particular contract.

Last price information shows you the value the option was last traded for. It shows the date the option was last traded on, the open, close, high, low and the volume of the contract that were traded.

The Calculated Information separates the information, from last price, into Intrinsic and Time value - which will vary as the expiry date approaches.

A double click on the chosen contract will bring up the contracts chart. This chart can be used and altered in exactly the same way as a normal Stock chart, but shows the movement of the option contract price up until expiry.

It should be noted that ShareChart uses the last price to calculate the intrinsic value and time value. Due to the low liquidity of some options, the calculated intrinsic value and time value may not accurately reflect the current market value if the last price is far away from the current bid/ask spread.

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12.3 WARRANT SORTER

The Warrant Sorter is used to bring up all the different warrants for a particular stock.

To open the warrant sorter go to Derivatives < Warrant Sorter. In the space available insert the code of the stock you wish to view warrant data on. Then hit scan and all the data will appear, as shown in the following figure. You must keep both the Puts and Calls boxes ticked for the initial scan.

Warrant Sorter

Stock Code: Warrants

Warrant Type
☒ Calls ☒ Puts

Sort By
☐ Warrant Code
☐ Expiry Date
☐ Exercise Price
☐ Last Price
☐ Volume
☒ Intrinsic Value
☐ Time Value
☐ Warrant/Stock Price Change

Underline Price
 Open: 12.56
 High: 12.73
 Low: 12.56
 Close: 12.73
 Volume: 8,050,239

Scan
 Cancel

Warrants

- NCPWGA - SG AUST 1350 NCP CALL WARRANT 27-NOV-03
- NCPWGN - SG AUST 1250 NCP CALL WARRANT 09-OCT-03
- NCPWGO - SG AUST 1400 NCP CALL WARRANT 27-NOV-03
- NCPWGS - SG AUST 1100 NCP PUT WARRANT 09-OCT-03
- NCPWGT - SG AUST 1250 NCP PUT WARRANT 27-NOV-03
- NCPWMJ - MACQUARIE 1200 NCP CALL WARRANT 25-SEP-03
- NCPWMK - MACQUARIE 1400 NCP CALL WARRANT 25-SEP-03
- NCPWML - MACQUARIE 1300 NCP CALL WARRANT 27-NOV-03
- NCPWMP - MACQUARIE 1200 NCP PUT WARRANT 25-SEP-03
- NCPWMQ - MACQUARIE 1200 NCP PUT WARRANT 27-NOV-03
- NCPWMR - MACQUARIE 1400 NCP PUT WARRANT 27-NOV-03
- NCPWMZ - MACQUARIE 1000 NCP PUT WARRANT 25-SEP-03
- NCPWQA - CITIWARRANTS 1300 NCP CALL WARRANT 25-SEP-03
- NCPWOB - CITIWARRANTS 1250 NCP CALL WARRANT 18-DEC-03
- NCPWOC - CITIWARRANTS 1350 NCP CALL WARRANT 18-DEC-03
- NCPWOO - CITIWARRANTS 1200 NCP CALL WARRANT 25-SEP-03
- NCPWOX - CITIWARRANTS 1150 NCP PUT WARRANT 25-SEP-03
- NCPWOY - CITIWARRANTS 1100 NCP PUT WARRANT 18-DEC-03
- NCPWSI - UBS WARBURG 2200 NCP CALL WARRANT 26-FEB-04
- NCPWZC - ABN AMRO 1250 NCP CALL WARRANT 25-SEP-03
- NCPWZD - ABN AMRO 1150 NCP CALL WARRANT 25-SEP-03
- NCPWZX - ABN AMRO 1050 NCP PUT WARRANT 25-SEP-03

Additional Warrant Information

Issuer Name: NEWS
 Industry Group: Consumer
 Industry Subgroup: Media
 First Traded: 24 Jul 2003
 Delivery Type: PHYS
 Exercise Type: European
 Underline Product Type: Equity
 Shares per Contract:
 Open Interest:

Last Price Information

Date: 24/09/2003 Time:
 Open: 0.086 Close: 0.105
 High: 0.105 Low: 0.086
 Volume: 774,500

Calculated Information

Intrinsic Value: 0.000
 Time Value: 0.105
 Warrant/Stock Price Change: 0.000

You can tick either Puts or Calls making it possible to see only Puts or Calls data, or both. The order of the data can also be varied, by ticking any one of the boxes within the 'Sort By' column. This enables you to quickly search through the warrants efficiently.

The Underline price box informs you of the price of the Stock at the last time you downloaded data for the particular stock, with open, high, low, close and also the volume for the day. Within the warrants box the different colors are keys to 'in the money' and 'out of the money' warrants. With Green representing 'in the money' and red representing 'out of the money' warrants respectively.

Once you have sorted your warrants and found the one you want highlighting it will bring up some Additional information.

This additional information can be seen within the table to the right of the warrant data. It provides you with some general information about the company and about the warrant itself. Such as the industry and Industry Subgroup, you can also see what the open interest is on the particular warrant.

Last price information shows you the value the warrant was last traded for. It shows the date the warrant was last traded on, the open, close, high, low and the volume of the warrant that were traded.

The Calculated Information separates the information, from last price, into Intrinsic and Time value - which will vary as the expiry date approaches.

A double click on the chosen warrant will bring up the warrants chart. This chart can be used and altered in exactly the same way as a normal Stock chart, but shows the movement of the warrant price up until expiry.

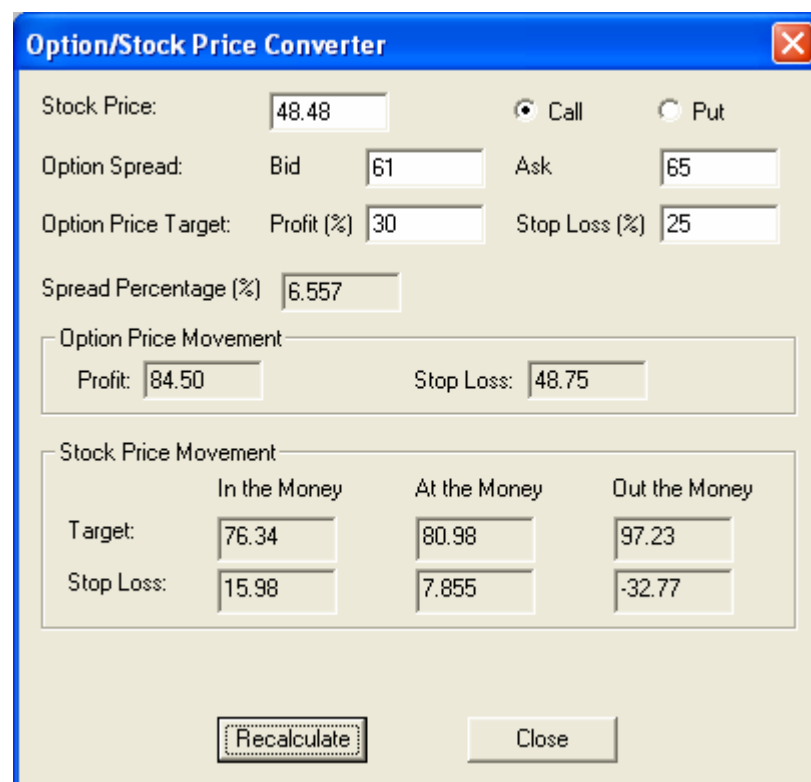
Sharechart

12.4 OPTION / STOCK PRICE CONVERTER

(This feature is for limited users only)

The Option / Stock Price converter gives a quick and accurate calculation of current or potential Option and Stock trades. It has the needed features such as Stop loss, profit target and spread calculation.

To open the Converter go to Derivatives < Option / Stock Price Converter. Now all you need to do is fill in the appropriate fields. An example is seen below.



The image shows a software dialog box titled "Option/Stock Price Converter". It contains several input fields and buttons. The "Stock Price" field is set to 48.48. The "Option Spread" section has "Bid" at 61 and "Ask" at 65. The "Option Price Target" section has "Profit (%)" at 30 and "Stop Loss (%)" at 25. The "Spread Percentage (%)" field is set to 6.557. Below these are two sections: "Option Price Movement" with "Profit" at 84.50 and "Stop Loss" at 48.75; and "Stock Price Movement" which is a table with three columns: "In the Money", "At the Money", and "Out the Money". The "Target" row shows values 76.34, 80.98, and 97.23. The "Stop Loss" row shows values 15.98, 7.855, and -32.77. At the bottom are "Recalculate" and "Close" buttons.

	In the Money	At the Money	Out the Money
Target:	76.34	80.98	97.23
Stop Loss:	15.98	7.855	-32.77

Firstly enter the Stock price in the relative box. Then select whether you are going to trade a call or a put. It does not matter which if you are trading Stocks rather than options. To get the spread percentage, fill in the relevant fields of Bid and Ask prices.

The last fields to fill are the Profit and Loss targets; depending on your specific investment goals these will vary from person to person, simply enter your targets in a percentage form. Now hit the Recalculate button and the data will appear.

The Spread percentage tells you what the option contracts spread is. The option price movement shows you where the option price needs to move to in order for you to reach your profit and loss targets.

The stock price movement shows where the Stock price needs to move to in order for you to reach your Profit and Loss targets. It supplies you with an in the money, at the money and out of the money analysis, depending on which you are focusing on.

12.5 OPTION PROFIT/LOSS CALCULATOR

(This feature is for limited users only)

The Option Profit / Loss calculator is an excellent tool for analyzing your transactions. The calculator can quickly and easily evaluate your potential trades and provide you with valuable information to control your transaction.

Access the calculator through Derivatives < Option Profit / Loss Calculation.

Option Profit/Loss Calculation

No of Contracts:10

Brokerage per Contract(\$):1.5Minimum:14.95

Cost

Option Price:1.5

Total Cost:15015

Profit / Loss

At (%):30Target Price:1.95

Total Revenue:19500Profit / Loss:4470

Recalculate

Close

Simply enter in the necessary data. The brokerage is set on default for the Options Xpress prices. You can alter the profit percentage to suit. If you want to calculate loss, simply enter the negative percentage in the "At (%)" field.

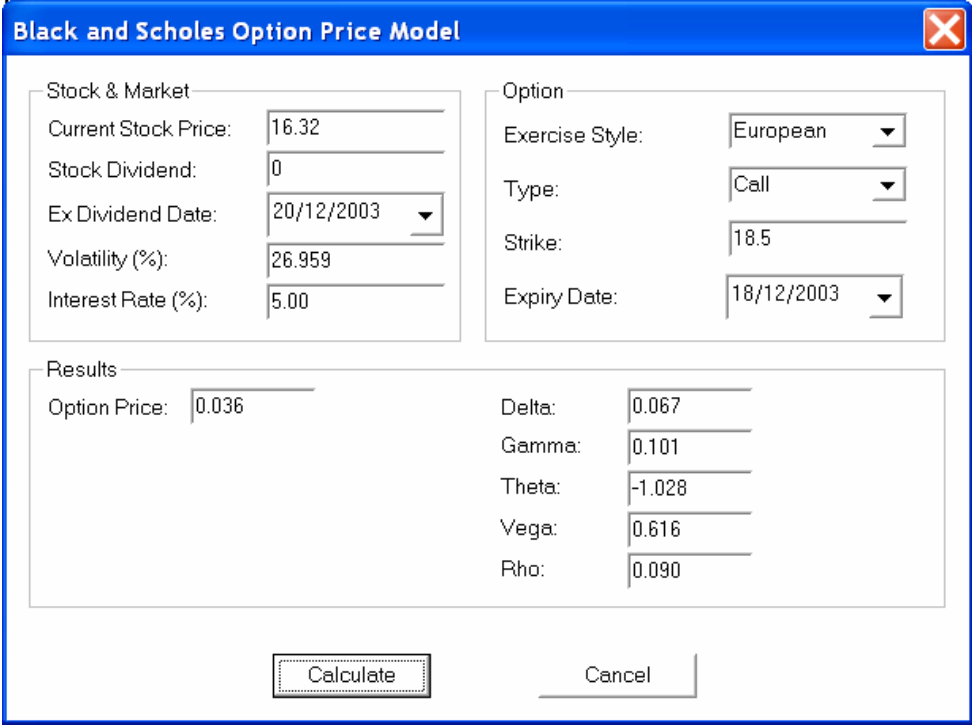
12.6 BLACK SCHOLES MODEL

Black Scholes Option Price Model is used to estimate the theoretical fair value of an option. It is based on stochastic partial differential equations governing the price of an asset where a fair price of any financial instrument is determined by time, uncertainty, and the risk-free rate of return.

The first part of the model derives the expected benefit from acquiring a stock outright. This is found by multiplying stock price by the change in the call premium with respect to a change in the underlying stock price.

The second part of the model, gives the present value of paying the exercise price on the expiration day.

To use Black Scholes Model, go to Derivatives > Options Black Scholes Model. In the following Black Scholes Model dialog box, enter the information in the upper part, click "Calculate" button. The result will be shown in the "Results" box.



The dialog box titled "Black and Scholes Option Price Model" contains two main sections: "Stock & Market" and "Option".

Stock & Market:

- Current Stock Price: 16.32
- Stock Dividend: 0
- Ex Dividend Date: 20/12/2003
- Volatility (%): 26.959
- Interest Rate (%): 5.00

Option:

- Exercise Style: European
- Type: Call
- Strike: 18.5
- Expiry Date: 18/12/2003

Results:

- Option Price: 0.036
- Delta: 0.067
- Gamma: 0.101
- Theta: -1.028
- Vega: 0.616
- Rho: 0.090

Buttons: Calculate, Cancel

ShareChart also provides Black Scholes Option Price as an indicator in the Indicator dropdown box. All you need is to go to an option market, open an option chart and select Black Scholes Option Price from the Indicator dropdown box.

You can get the historical volatility of underlying stock by selecting Volatility from the Indicator dropdown box and only historical volatility will be displayed for the stock. If you want to view the implied volatility of an option, you must in a respective options market, open the option chart, and select Volatility from the Indicator dropdown box, both historical volatility for the underlying stock and implied volatility for the option will be displayed in the same window.

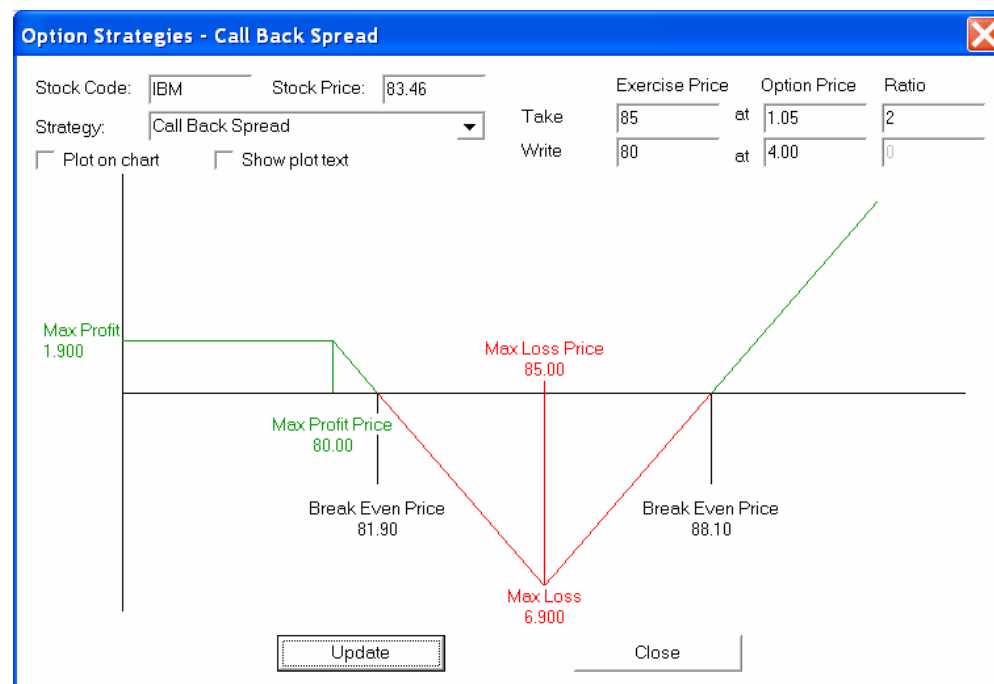
12.7 OPTION STRATEGIES

ShareChart has included some of the most popular Option Trading Strategies. The strategies can be found under Derivatives < Option Strategies. Simply enter the necessary data, an easy to understand chart showing all of the critical points of the strategy will be formed.

The strategies can be used before entering a transaction, during a transaction or after the transaction is complete. Most often the strategies will be used before entering a transaction. The Option Trading Strategy calculators are excellent tools for working out the complex break even and profit levels.

The Option Trading Strategies function is an efficient tool that should be utilized by any trader contemplating entering an option strategy. The ease in which the Option Trading Strategy produces the critical points of the transaction make entering these strategies much less daunting and allows traders to analyze many more potential transactions.

To use the Option Strategies calculator, select Derivatives < Option Strategies. A dialog similar to the following will appear:



In the Option Strategies dialog box, enter the stock code, current stock price, and select an option strategy. Depending on the selected strategy, the option prices on the right will change accordingly. For example, the "Write" field will be disabled if you select the strategy Long Calls while the "Take" field will be disabled if you select the strategy Covered Calls. Filling the relevant prices on the right and clicking "Update" button, you will be presented with a chart indicating the maximum profit/loss and breakeven prices. For more information about the calculation of maximum profit/loss and breakeven prices, please visit the technical documents on our website: www.sharechart.com.au.

You can opt to view those profit/loss targets or breakeven points on the underlying chart by simply toggling "Plot on chart" field. You can toggle to show text as well.

12.8 CFD SETTINGS

CFD, Contracts For Difference, is another derivative that allows you to leverage your capital to trade stocks by borrowing capital from your CFD brokers. A CFD offers the benefits of trading shares without having to physically own them. However, you may face margin calls or lose your initial capital completely if the market goes against you. With CFDs, you greatly expose yourself to the risk of big losses.

We would like to warn you that CFDs are a highly geared product and can result in losses that exceed your initial deposit. You must fully understand the risks involved in trading CFDs.

CFD Settings are used to set global parameters for CFD calculators (in the following sections) and CFD portfolios. To open the CFD Settings, go to Derivative < CFD Settings, the following screen appears.

Field	Value
Base Rate %	5.5
Long Rate %	3
Short Rate %	3
CFD Commission Rate %	0.125
Equity Commission Rate %	1
Margin Stop Loss %	20
Default CFD Margin Value \$	2000
Projected Price Change %	10
Price Change Period	20
Minimum CFD Commission \$	12.5
Minimum Equity Commission \$	50

Fields in the above dialog box are explained as follows.

Base Rate %: Base rate that is the base for long or short trading type. If the trading type is long, the base rate is added with long rate as the interest rate charged to traders. If the trading type is short, the based rate is deducted by the short rate as the interest rate credited to traders. The interests are calculated on daily basis.

Long Rate %: Long rate is the interest rate added to the base rate to form the interest for longing CFDs. It will be calculated daily and debited from trader's trading account.

Short Rate %: Short rate is the interest rate subtracted from the base rate to form the interest for shorting CFDs. It will be calculated daily and credited to trader's trading account.

CFD Commission Rate %: Commission rate on the total value of traded CFDs.

Equity Commission Rate %: Commission rate on the total value of traded equities.

Default CFD Margin Value \$: The default margin value that you prepare to trade in CFDs. Depending on the margin rate of a stock, you can trade 100/margin rate times more value of CFDs.

CFD Settings

Derivatives

Projected Price Change %: The anticipated price change in the future. If you expected price declines by 10%, then you enter -10 in this field.

Price Change Period: The period that the projected price change will occur.

Minimum CFD Commission \$: Minimum CFD commission required by your CFD broker now matter how much you have traded.

Minimum Equity Commission \$: Minimum equity commission required by your equity broker now matter how much you have traded.

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12.9 CFD vs EQUITY CALCULATOR

CFD vs Equity Calculator gives the demonstration on the difference of trading CFDs versus Equities. CFD vs Equity Calculator can be open in several ways. The most common way is to open the CFD vs Equity Calculator when a chart open. In this case, the CFD vs Equity Calculator will take the current close price as its entry price and calculate information along with the default data in CFD settings. The following is an example for BHP when BHP chart is open and you select CFD vs Equity Calculator from Derivatives menu.

	CFD	Equity
Initial Outlay	1,948.80	38,976.00
Entry Commission	48.72	389.76
Exit Commission	53.59	428.74
Interest	-218.12	
Capital Profit/Loss	3,897.60	3,897.60
Capital Required	1,997.52	39,365.76
Total Profit/Loss	3,577.17	3,079.10
Return	179.08%	7.82%
Days Held	21	21
Initial Stop Loss Price	38.02	
Initial Margin Stop Loss	19.79%	

In the above example, the close price of 38.4 is taken as its entry price and last date on the chart as entry date for the LONG trading type. The number of CFDs that can be traded is calculated based on its entry price and the default margin value in the CFD Settings. With the projection of 10% change in the CFD settings, the exit price is obtained. Similarly, exit date is also derived from the price change period in the CFD settings. Interest and commission rates are also obtained from the CFD settings. Margin rate is obtained from margin table that is updated daily from your daily data download.

According to the information on the left panel, the calculated information is provided on the right where comparisons between CFDs and equities are made. The initial outlay is derived from its entry price and the default margin value in CFD Settings. Therefore, it should always be less or equal to the default CFD margin value. Initial stop loss price is calculated based on the margin stop loss % in CFD Settings. It will protect you from losing the maximum margin stop loss percentage. Based on the initial stop loss price, the actual margin stop loss percentage is recalculated that should be less or equal to the margin stop loss percentage in CFD Settings. In the above example, it is 19.79% and its initial stop loss price 38.02.

CFD vs Equity Calculator

Derivatives

If the open chart is not in CFD margin table (the stock is not CFD tradable), you will be popup an error message saying it is not a CFD stock. You can select Continue button to continue the calculation but you will have to enter the margin rate manually.

You can perform the CFD vs equity calculation based on any two price points on a chart. All you need is to draw two vertical lines on the chart and select CFD vs Equity Calculator from the Derivative menu. If you have more than two vertical lines on the chart, the CFD vs Equity Calculator will always pick up the last two lines. If there is only one vertical line on the chart, the vertical line will be used as entry points and the last price bar as exit point in the CFD vs equity calculation. If there is no vertical bar on the chart, the last price is used as entry point and the exit point will be based on projected price change and change period as in CFD settings, as discussed above.

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12.10 CFD WITH OPTION PROTECTION

(This feature is for limited users only)

When you trade CFDs, you may lose considerable capital due to the leverage nature. Stop loss is one of the measures to protect your capital. Another way of protection is to buy put options for long CFD position and call options for short CFD position. With the option protection, the maximum you can lose is the option cost and interest.

To open the CFD with option protection, go to Derivative < CFD with Option Protection, the following screen appears.

CFD Trading With Option Protection

Capital:
 Initial Capital: 20000
 % For Trading CFDs: 50
 Interest Rate (%): 8.5
 Days in Market: 60

CFD:
 Code:
 Share Price: 10
 Margin (%): 5
 Retrieve

CFD Values:
 No of CFDs: 0
 Total CFD Value: 0
 Breakeven Price 1: 0
 Breakeven Price 2: 0

Costs:
 Interest Per Day: 0
 Total Interest: 0
 Total Cost: 0
 Margin Required: 0
 Initial Outlay: 0

Put Options To Protect Trading Type: LONG

Duration in Month	Strike Price	Option Price	% More Options	Number of options	Intrinsic Value	Time Value	Time Value %	Monthly % of Time Value	Total Option Cost

☒ Show plot text

Update Set Default Plot On Chart Clear Plot on Chart Close

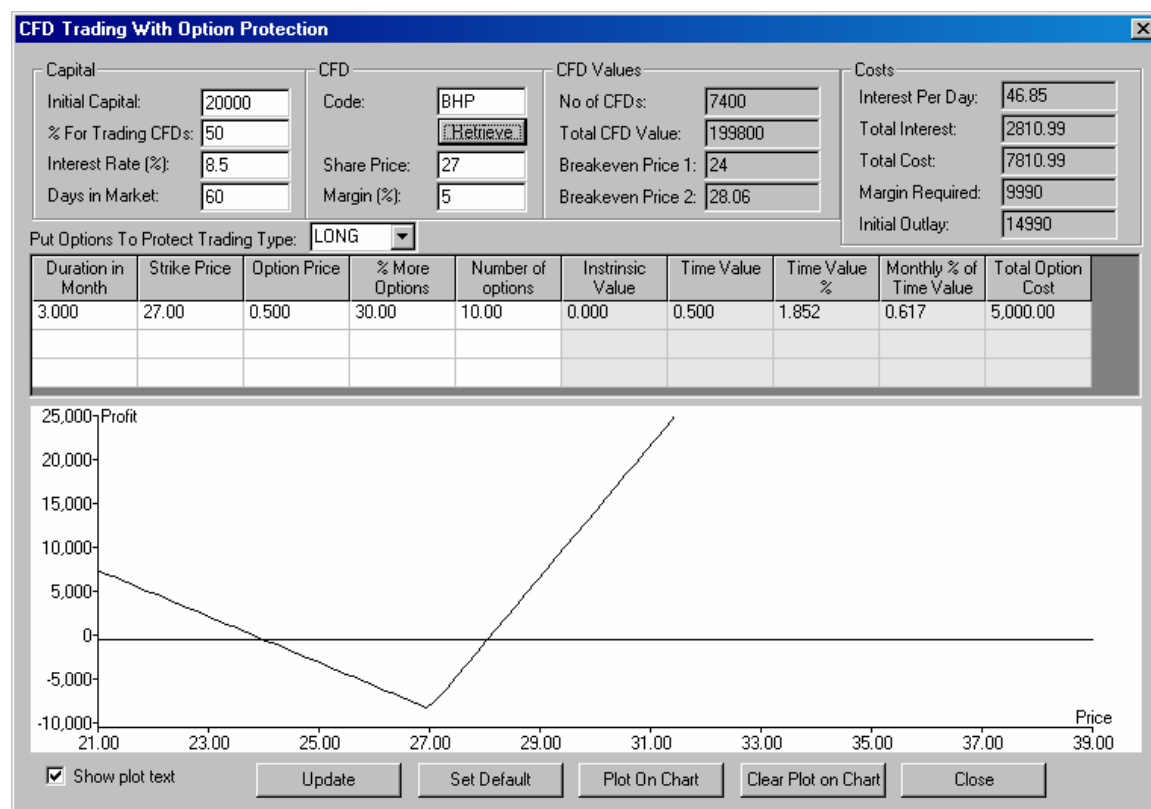
By default, ShareChart fills the default values for you. You can change according to the share and your trading strategy. For example, you may increase the proportion of your initial capital from 50% to 60% for trading CFDs so that you gain more exposure to the market.

In the options fields, you can enter up to three options to protect the CFD trading. You can specify how much more options to buy in order to better protect CFDs. The number of options will be calculated once Update button is clicked. If you enter a number in the Number of Options field or the initial Number of Options is not zero, the number of options will not be calculated even you enter a number in the % More Options field.

When Update button is clicked, all grayed fields will be displayed with calculated values, along with a profit graph versus price changes, as shown in the following figure.

CFD with Option Protection

Derivatives



In the above figure, the total cost is the sum of interest and option costs. The initial outlay is the sum of margin and option costs. When Short trading type is selected, the total cost will be the option costs minus interest. You may also change interest rate accordingly.

If you have saved CFD with option protection data, you can retrieve them by typing in Code field and clicking Retrieve button. All data will be retrieved together with calculated results, as shown in the above figure. If you open the CFD Trading With Option Protection dialog box from an open chart, the CFD with option protection data for the open chart will be retrieved and displayed in the dialog box if they exist.

If you click Plot On Chart button, ShareChart will save the current CFD with option protection data and open the underlying stock and draw breakeven price lines with shaded color areas, where green area indicates profit area and red area loss area, as shown in the following figure.

CFD with Option Protection

Derivatives



You can clear the plotting on chart by clicking Clear Plot on Chart button.