



Connect User Guide

July 2020

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Connect Web User Guide

Overview

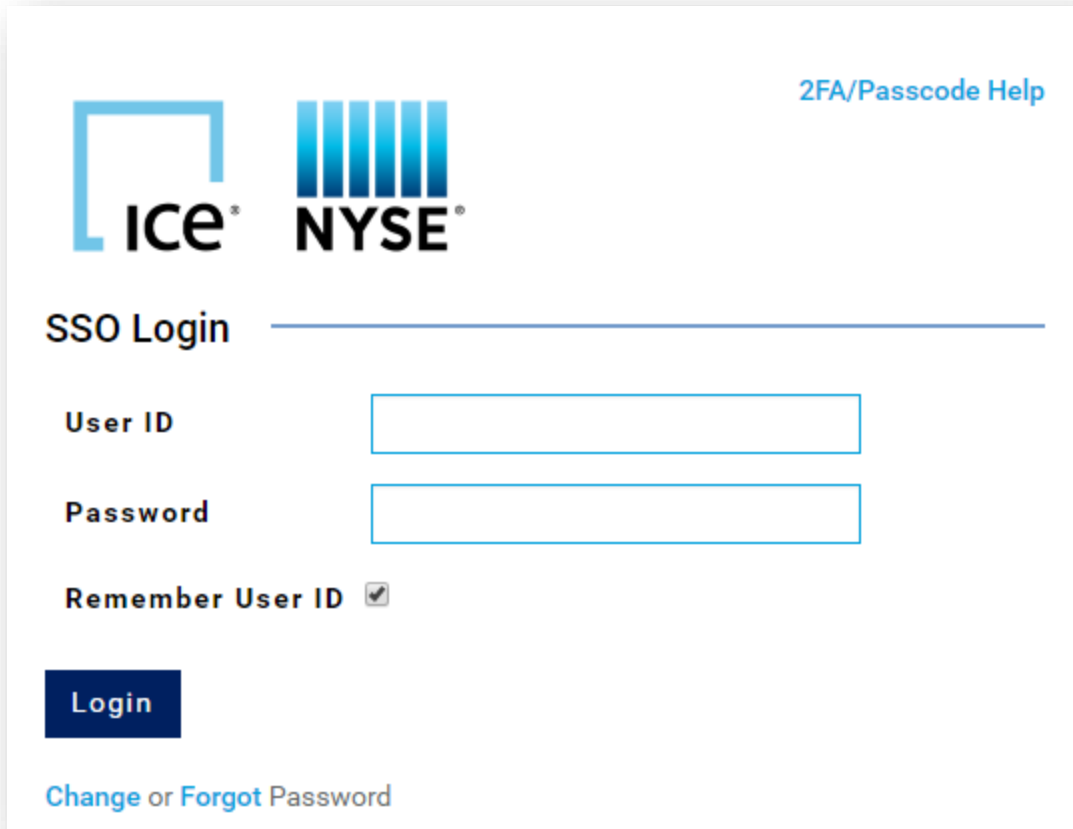
Connect is a web-based real-time streaming application. A persistent TCP connection is established in order to provide access to streaming quotes. This connection remains active for the duration of the user's session. The widgets available will be based on user's permission.

List of Widgets:

- [Chart](#)
- [Detailed Quotes](#)
- [Watch List](#)
- [Options](#)
- [News](#)
- [Calendar](#)
- [Market Depth](#)
- [Forex](#)
- [Screener](#)
- [Time and Sales](#)
- [Alerts](#)

Logging In

Users can log in via <https://connect-web.theice.com>, by their User ID and password



The screenshot shows the SSO Login page for ICE and NYSE. At the top right, there is a link for "2FA/Passcode Help". The ICE and NYSE logos are displayed on the left. Below the logos, the text "SSO Login" is followed by a horizontal line. There are two input fields: "User ID" and "Password". Below the "Password" field is a checkbox labeled "Remember User ID" which is checked. A dark blue "Login" button is positioned below the checkbox. At the bottom left, there is a link for "Change or Forgot Password".

[2FA/Passcode Help](#)

ICE **NYSE**

SSO Login

User ID

Password

Remember User ID

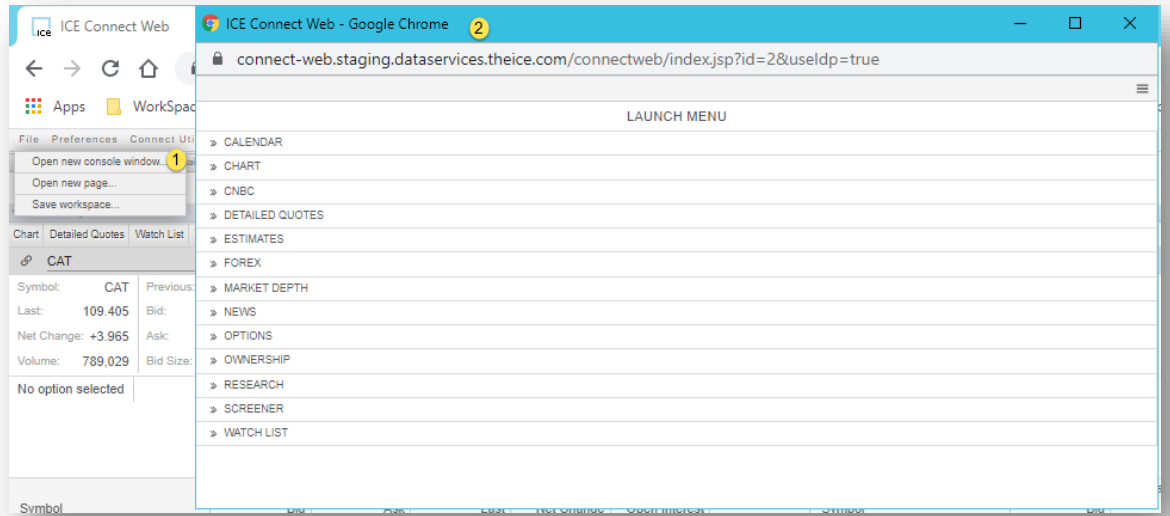
Login

[Change](#) or [Forgot](#) Password

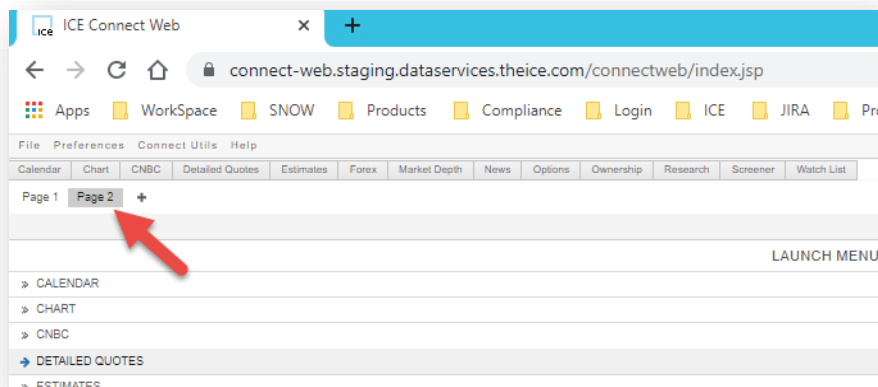
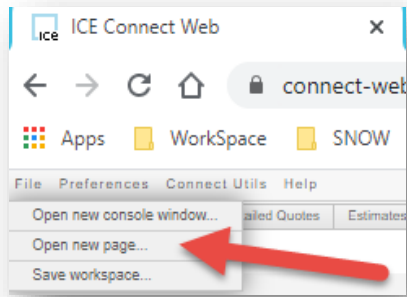
Menu Bar

File

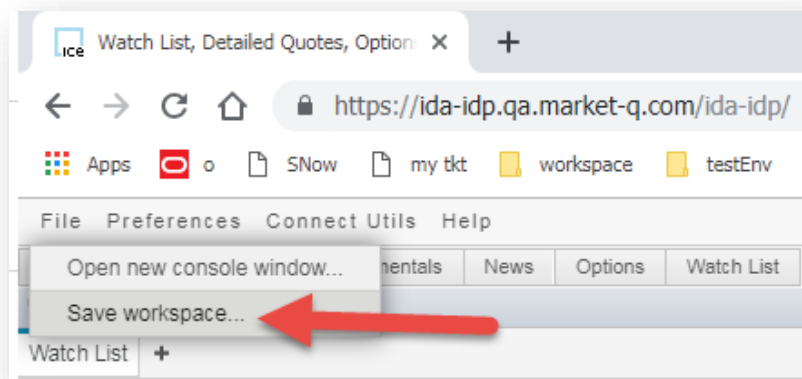
Open new console window: this opens a new browser window displaying the launch menu



Open new page: this opens a new page displaying the launch menu



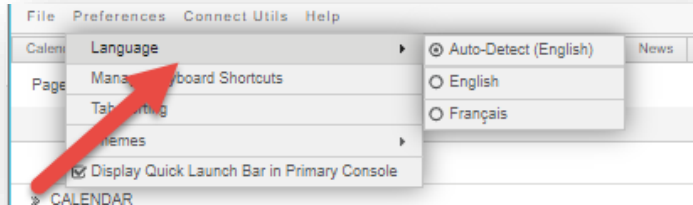
Save workspace...: this option allows you to manually save your entire workspace. Widgets opened, placement, settings.



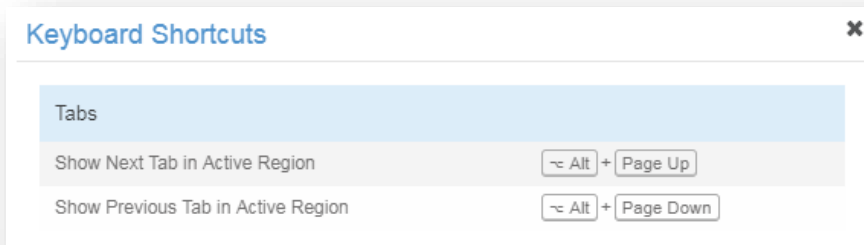
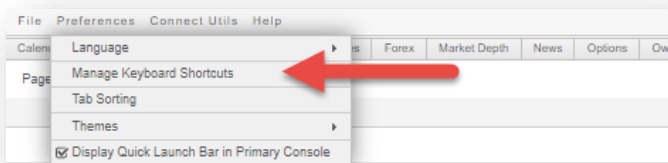
Preferences

Language: Option to change the language:

- Auto-Detect
- English
- Français

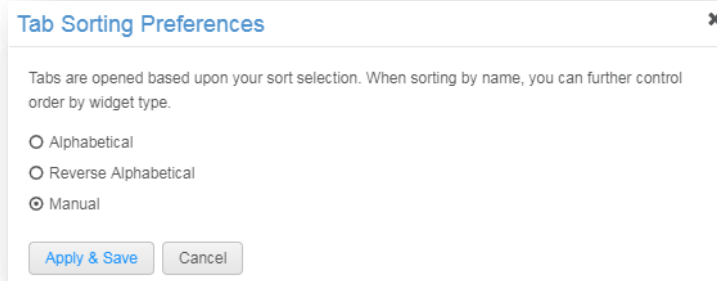
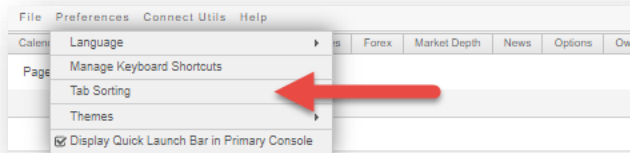


Manage keyboard shortcuts: displays the keyboard shortcuts you could use to



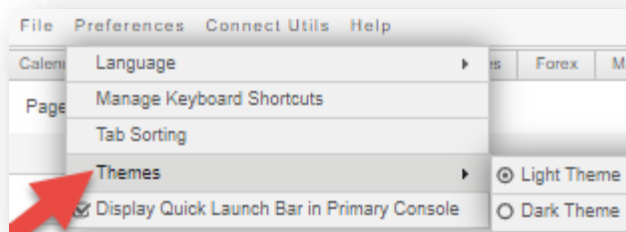
Tab sorting: options to display your tabs:

- Alphabetical
- Reverse alphabetical
- Manual



Themes: option to display your workspace in:

- Light theme: white background
- Dark theme: black background



File Preferences Connect Utils Help

Chart Detailed Quotes Fundamentals News Options Watch List

PrincipalRegion

Watch List +

NASDAQ 100

Symbol	Time	Last	Date
\$NDX [15]	15:59:53	7307.93	05/22/2019
ATVI [15]	08:58:18	42.19	05/23/2019
ADBE [15]	08:58:25	274.25	05/23/2019
AMD [15]	08:58:40	26.36	05/23/2019
ALGN [15]	08:52:20	307.85	05/23/2019
ALXN [15]	08:15:00	125.33	05/23/2019
AMZN [15]	08:58:41	1815.48	05/23/2019
AMGN [15]	08:51:35	172.11	05/23/2019
AAL [15]	08:49:50	29.50	05/23/2019
ADI [15]	08:52:01	98.73	05/23/2019
AAPL [15]	08:58:38	179.66	05/23/2019
AMAT [15]	08:34:20	39.94	05/23/2019

light theme

File Preferences Connect Utils Help

Chart Detailed Quotes Fundamentals News Options Watch List

PrincipalRegion

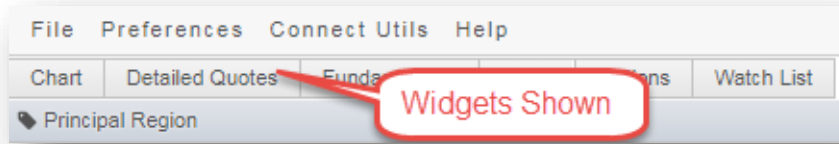
Watch List +

NASDAQ 100

Symbol	Time	Last	Date	Open
\$NDX [15]	15:59:53	7307.93	05/22/2019	7331.67
ATVI [15]	08:59:01	42.19	05/23/2019	
ADBE [15]	08:58:25	274.25	05/23/2019	
AMD [15]	08:59:01	26.36	05/23/2019	
ALGN [15]	08:52:20	307.85	05/23/2019	
ALXN [15]	08:15:00	125.33	05/23/2019	
AMZN [15]	08:59:01	1815.48	05/23/2019	
AMGN [15]	08:59:00	172.11	05/23/2019	
AAL [15]	08:49:50	29.50	05/23/2019	
ADI [15]	08:52:01	98.73	05/23/2019	

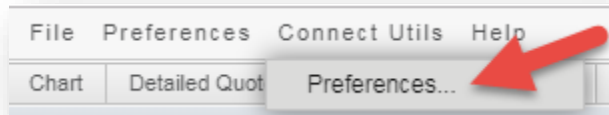
dark theme

Display Quick Launch Bar in Primary Console: option to display the quick access widget toolbar at the top left of the browser



Connect Utils

Preferences: allows you to adjust display preferences that will apply to all of your widgets



- **Formatting:** allows you to define how digital data is formatted. How many decimals places for dollar and percentage amounts.

Formatting

Data Formatting

Classic
 Formatted
 Decimal

Raw data: 45.12345678912345666
Formatted: 45.12
Formatted: 45.1212 (full precision)

Precision

Show Full Precision on Trade Data

Decimal & Dollar Display Format

Decimal and Dollar format

Use brackets on Negative Values (Decimal and Dollar format needs to be selected)

Percent Display Format

Percent format

C

- **Time zone:**
 - o Time zone settings:
 - Display in Local: based on the time on your computer
 - Display in Exchange: based on the time of the Exchange
 - Display in GMT: based on GMT time
 - Time zone offset: sub-option to adjust the numbers of hours you'd like to offset your selected time zone
 - o Date & time display format:
 - Date format: how you'd like the display for placement of the date, month and year
 - Time format: how you'd like display for placement of hours, minutes and seconds

- Override market clock time format: sub-option that overrides the market clock time format if you have it as anything other than HH:mm:ss

Time Zone

Time Zone Settings

Display in Local
 Display in Exchange
 Display in GMT

Timezone Offset

Date & Time Display Format

Date Format:

Time Format:

Override market clock time format (time format needs to be selected)

- **Appearance:**

Appearance

Theme

Show Toolbar

Market Indicators

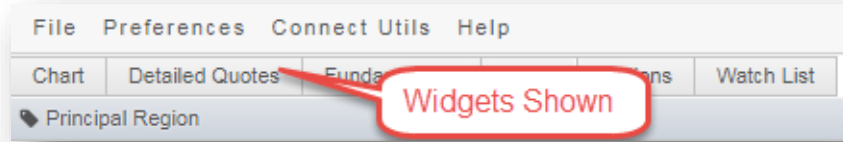
Color (based on Net Change)

Up

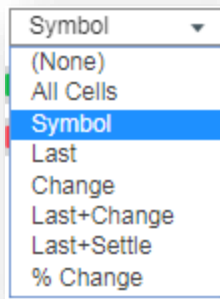
Down

- **Theme:** option to display your workspace in:
 - Light theme: white background
 - Dark theme: black background

- **Show toolbar:** option to display the quick access widget toolbar at the top left of the browser



- **Market indicators:** options to change the color of a certain field by the direction of change
 - o Color (based on net change)

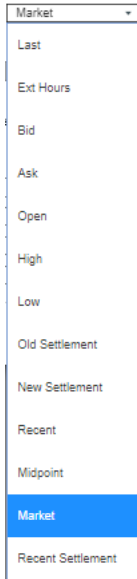


- o **Up:** color of field change when it goes up
- o **Down:** color of field change when it goes down
 - **Options Model:** allows you to adjust the settings for the options widget

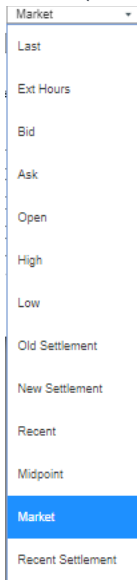
- **Option Model:** option to change the model



- Price (Option ImpVol.):



- Price (Underlying ImpVol.):

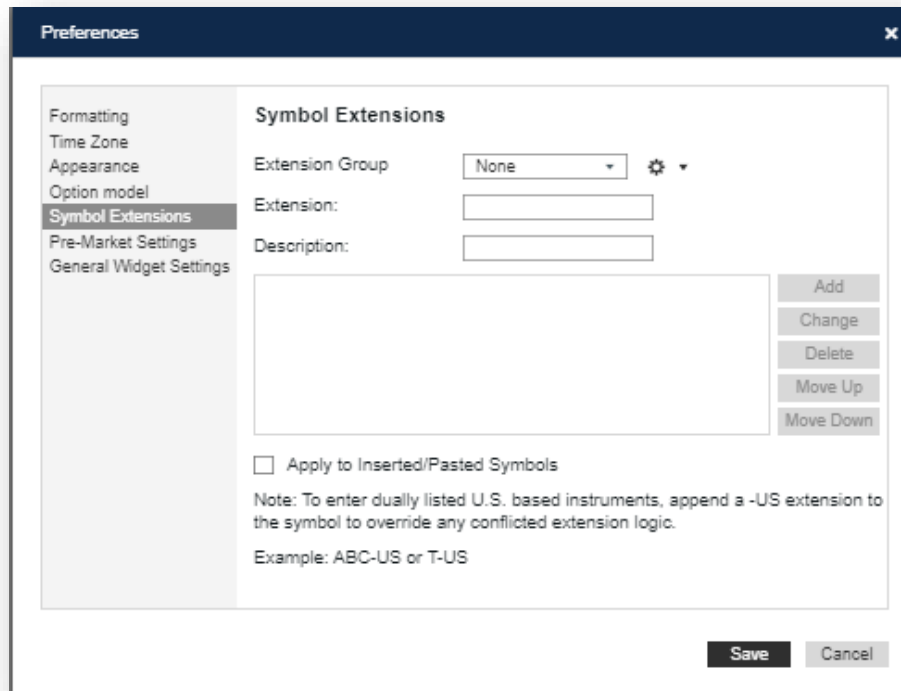


- Dividend Yield (Equity Index):

 %

- Greeks Displayed in Ticks
- When option is intrinsic or less, show “-“
- Interest rates

- **Symbol extensions:** A symbol extension is the suffix that appears after a root symbol in for some exchanges, such as NYSE BQT, Nasdaq Basic, and Non-US exchanges.



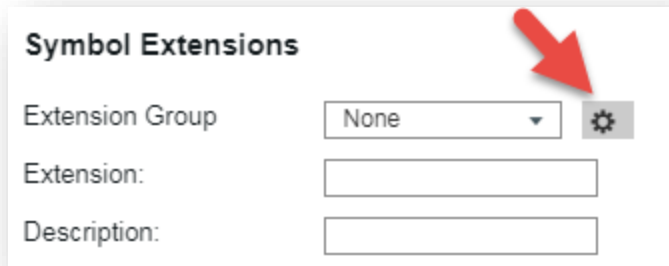
For example, IBM-BQ or APHA-TC

Symbol Extension preferences allow symbol extensions to be associated with specific exchanges so that when a root symbol is added, the extension is added automatically.


For example, entering in IBM and hitting enter, the resulting symbol will be IBM-BQ, and should the BQ symbol extension preference be set.

Extension Group: A list of the most common symbol extension choices.

The gear icon to the right of this option allows you create, rename, and delete included or custom added symbol extensions.



Symbol Extensions

Extension Group: None 

Extension:

Description:

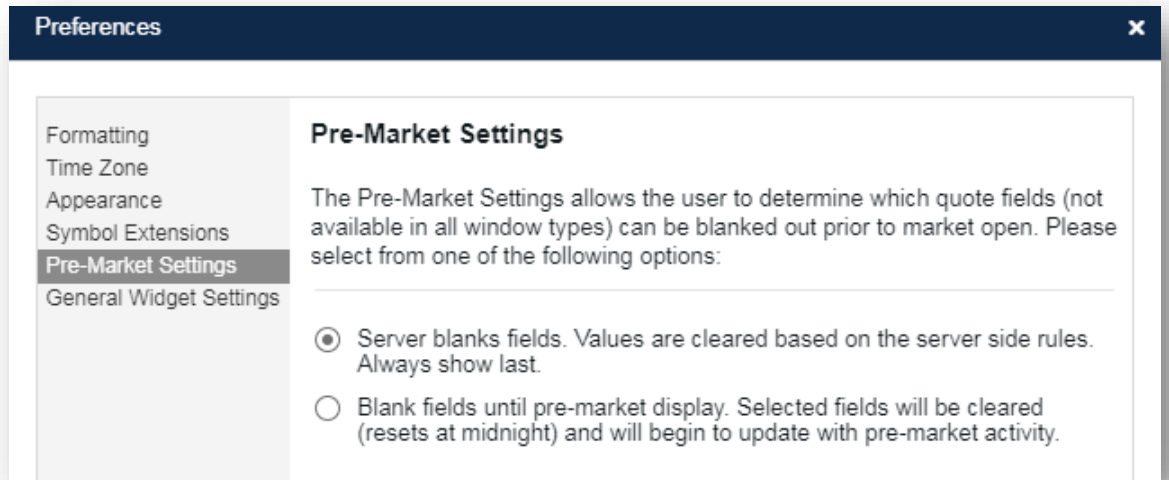
Extension: Used to enter a custom symbol extension that is not listed in the included list.

Description: Used to enter a custom description to a custom symbol extension.

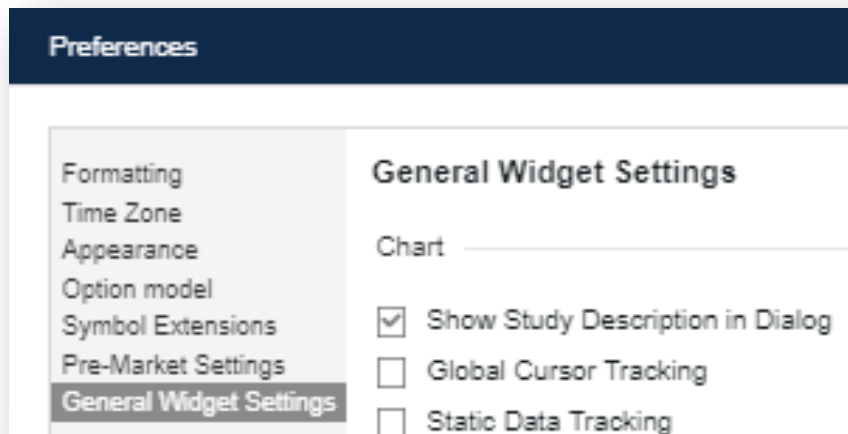
Apply to Inserted/Pasted Symbols: If there is an active symbol extension, this box must be checked off to activate the automatic adding of the extension to symbols that are added to the application.

To add a symbol extension to newly entered symbols:

1. Select the symbol extension from the Extension Group drop down. If it does not exist, click on the gear icon to name it, then enter the extension and add a description.
2. Ensure the Apply to Inserted/Pasted Symbols check box is checked.
 - **Pre-market settings: allows the user to determine which quote fields (not available in all window types) can be blanked out prior to market open.**
 - Server blanks fields. Values are cleared based on the server side rules
 - Blank fields until pre-market display. Selected fields will be cleared (resets at midnight) and will begin to update with pre-market activity



- **General widget settings:** allows you to set preferences for behaviors for the entirety of the specified widget
- **Chart**
 - Show study description in dialog: allows you to show or hide the study's description definition when the Studies Dialog is open
 - Global cursor tracking: the cursor will display in all open Chart widgets at the same date and price if the time scale and price scale are in the same range



- **Static data tracking:** the cursor can be moved away from the point you've clicked on the Chart and the data view and

crosshair will display the data for that point you've clicked in the Chart

- **Alerts**
 - Show system notifications on/off toggle

Help

Please contact **External SN - ICE chat support icechatsupport@theice.com for help.

About: displays the commit hash, build timestamp, environment and attributions of your version of Connect Web



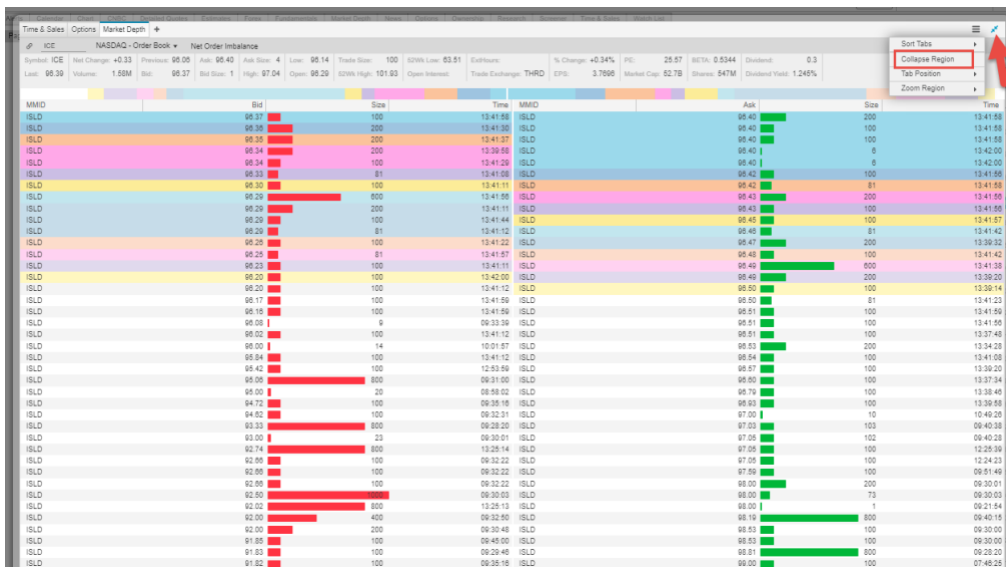
Regions Menu

The Regions Menu can be found on the upper right corner of a widget by the  icon.

Sort tabs: allows you to sort the order of the tabs in this region by A-Z or Z-A

Show region labels: this option only displays on the principal region. You can hide the principal region label to save space

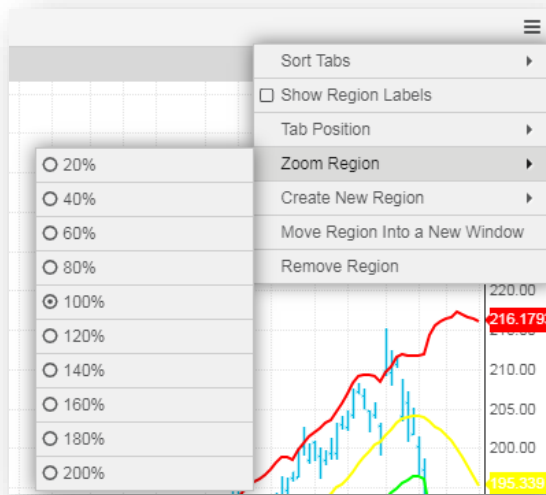
Expand Region: allows you to make a region full screen and collapse it back into the workspace by either clicking “collapse region” in the region menu, the collapse icon in the upper righthand corner, or pressing the “Esc” key on your keyboard



Tab position: allows you to choose where to display the tab in relation to the widget:

- Top
- Left
- Bottom
- Right

Zoom region: allows you to enlarge or reduce the content of the widget by increments of 20%.



Create new region: allows you to create a new region in relation to your current widget:

- On top
- On bottom
- To left
- To right

Move region

- New window:** moves the selected region to a new browser window
- New Page:** moves the selected region to a new page

Remove region: removes the region from your workspace, the removal will remove all tabs in the region

Set as principal region: allows you to set the selected region as the principal region, which is where all new widgets will open from the Widgets shortcuts on the toolbar

Pages

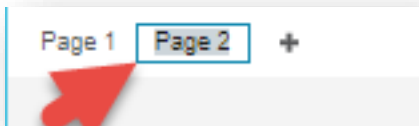
Pages can be found below the widget toolbar. Pages allow you to expand and organize your workspace as well as quickly switch between multiple workspaces.

Plus Icon: Allows a user to add a new page

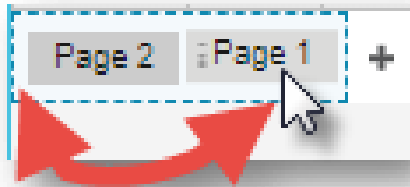


Changing Pages: clicking on a page will open that page

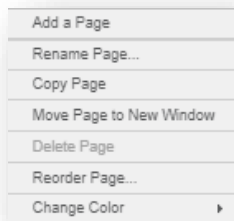
Double click: double clicking on a page allow you to edit the name of the page



Drag and Drop: clicking and holding allows you to drag and drop pages to rearrange their order



Pages Right Click



Add a Page: adds a new page to the right of the Page right clicked on

Rename a Page: allows you to edit the name of the Page right clicked on

Copy Page: creates a copy of the Page right clicked on

Move Page to New Window: moves the Page into its own new window

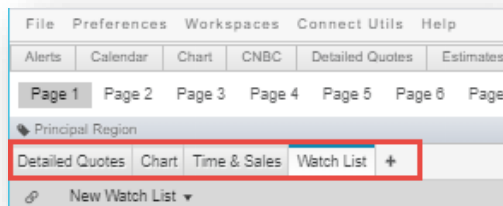
Delete Page: allows you to delete the right clicked on

Reorder Page: initiates a pop-up window that allows you to reorder Pages

Change Color: allows you to change the color of the title of the Page right clicked on

Widget Tabs

In each Region when multiple widgets are open you can toggle between the widget tabs to navigate between the widgets in that's region. Tabs can also be dragged and dropped within the region to rearrange their order, or to new or another existing region.



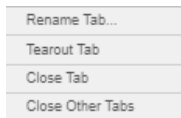
Plus Icon: displays the launch menu, which allows you to open one of the listed widgets in that same region

Double Click: double clicking on a widget tab allows you to tear out the tab into its own window

Drag and Drop Tabs: clicking and holding allows you to drag tabs in the same region, across regions, and windows.



Widget Tabs Right Click



Rename Tab...: allows you to rename a tab with a custom name



Tearout Tab: allows you to move the tab from the region to a new window

Close Tab: allows you to close the tab clicked on

Close Other Tabs: allows you to close all the tabs in the region except the tab clicked on

Chart

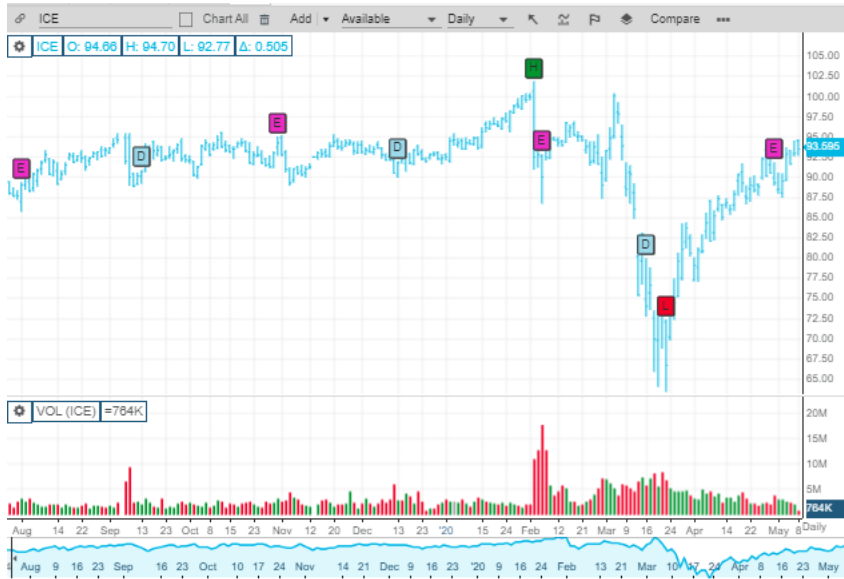
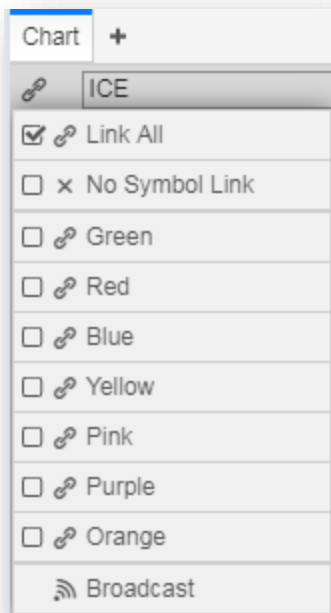


Chart Title Bar



Linking:

Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Watchlist to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Symbol Search Box: this is our symbol entry and symbol search entry point.

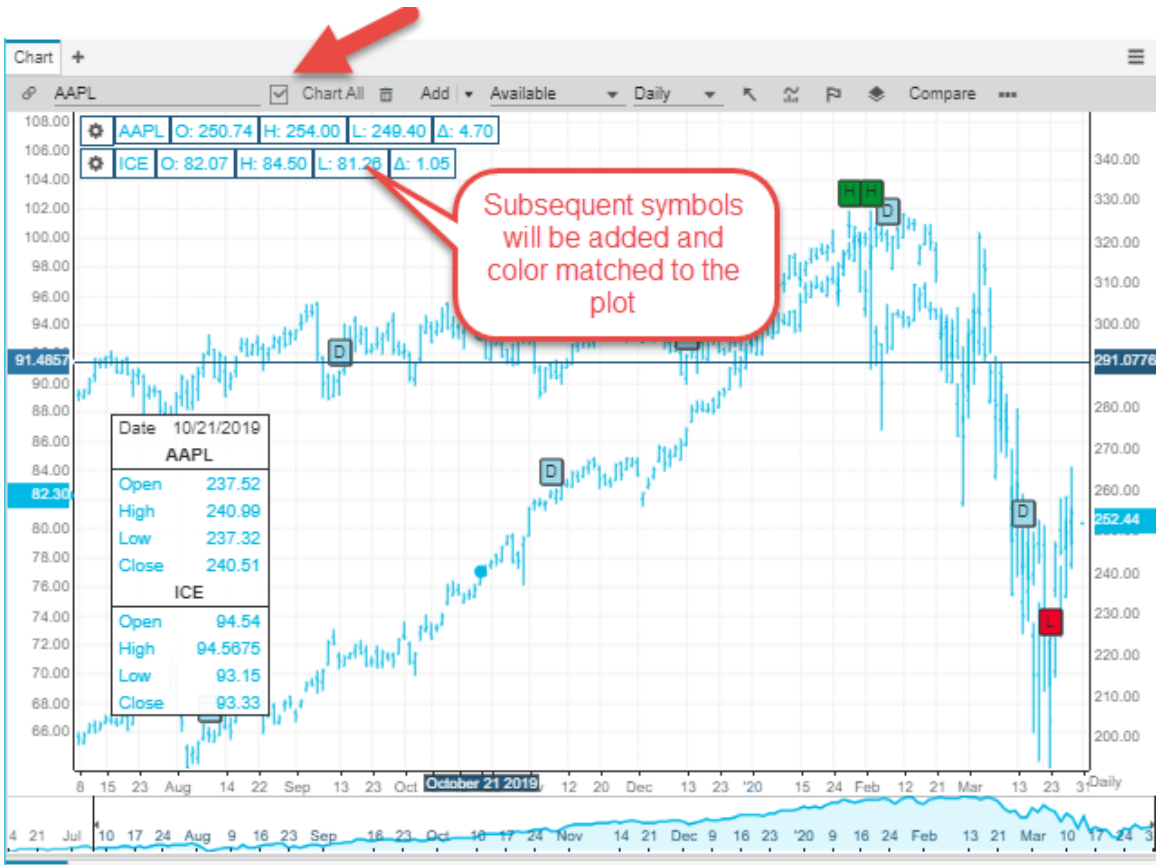
Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund

- Future
- Forex

ICE					<input type="checkbox"/> Chart All		Add		Available
All	Recent	Stock	ETF	Index	Fund	Future	Forex		
ICE			INTERCONTINENTAL ...				NYSE	Stock	
ICE-EEB			ICE CONCEPT				EEB	Stock	
ICE-ECL			ICE CONCEPT				ECL	Stock	
ICE-TC			CANLAN ICE SPORTS...				TC	Stock	
ICE-WSC			MEDINICE				WSC	Stock	
ICE-QL			CANLAN ICE SPORTS...				QL	Stock	
ICE-CS			CANLAN ICE SPORTS...				PUR	Stock	
ICE-QB			INTERCONTINENTAL ...				NYAB	Stock	
ICE-AC			CANLAN ICE SPORTS...				AC	Stock	
ICE-QN			CANLAN ICE SPORTS...				QN	Stock	

Chart All Icon: when this icon is enabled, symbols entered will overlay into your primary chart plot automatically into the existing scale.



Clear Chart Icon: the trash icon will remove all secondary symbols, Studies and Drawing Tools that you've previously added, thereby resetting your Chart. Individual Studies can be deleted by clicking on the select Study and pressing the Delete key.

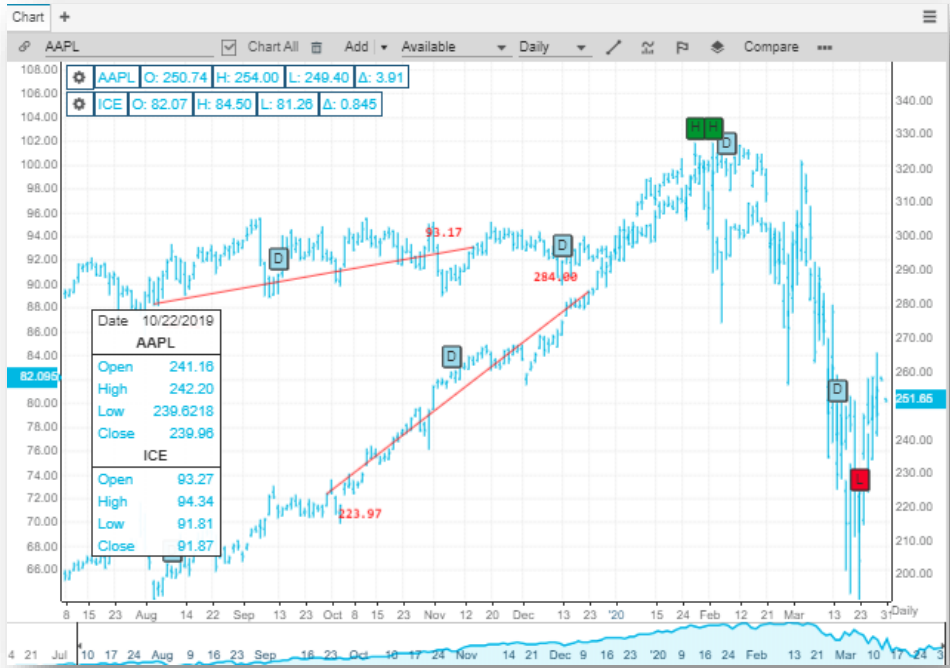


Figure 1 Chart with lines and additional symbols

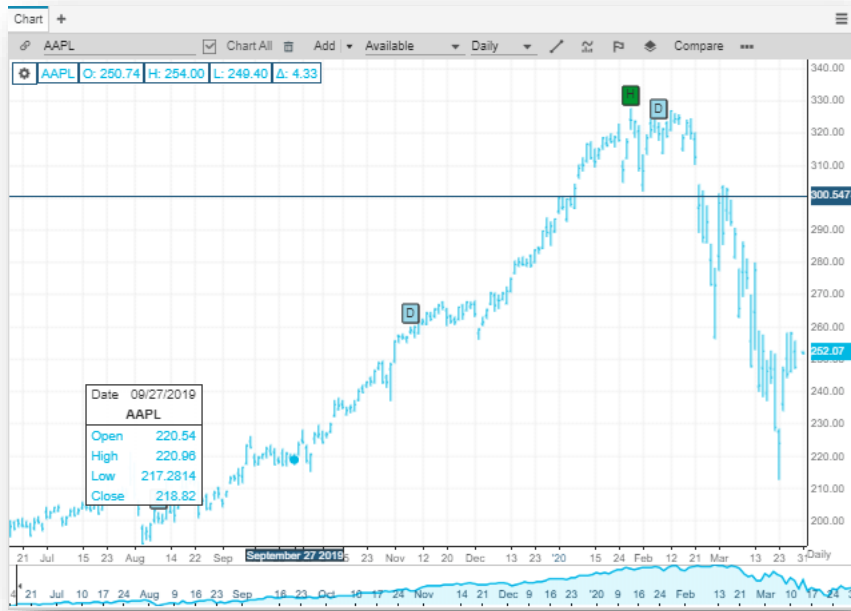
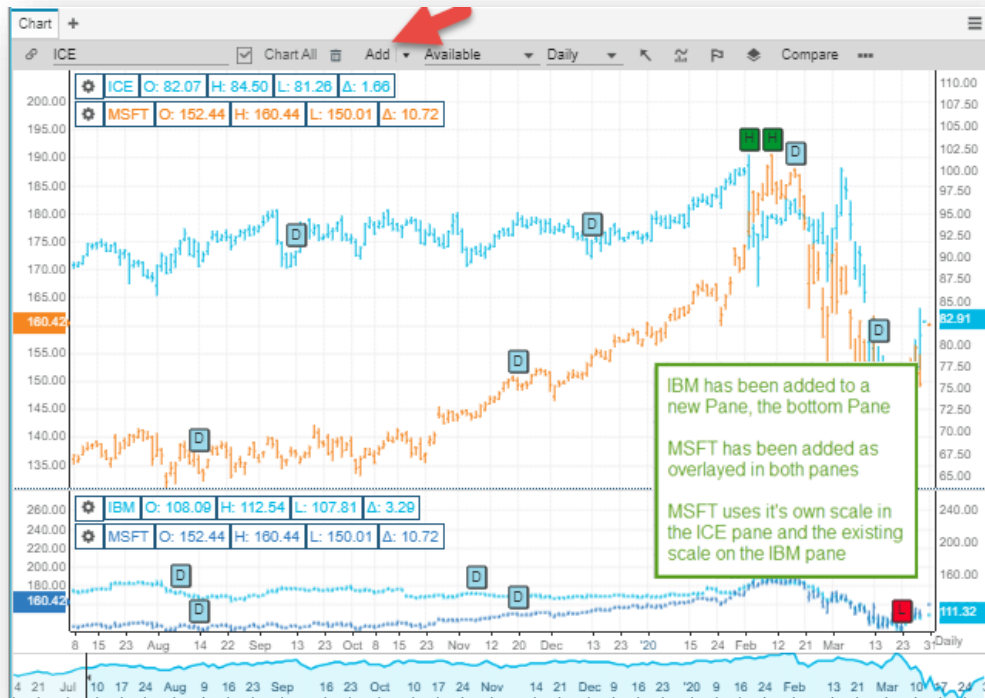
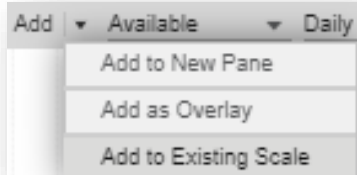


Figure 2 Chart cleared of lines and additional symbols

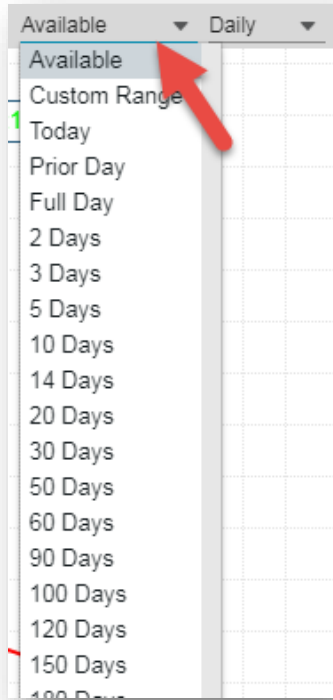
Add Icon: the add icon will allow you to overlay multiple symbols in a single chart window. In order that chart patterns can be compared more directly, the new symbol may also have its own scale.

Add Menu:

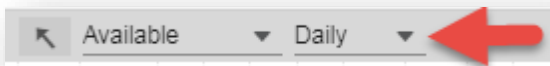
- **Add to New Pane:** adds symbol to a new Pane in existing window
- **Add as Overlay:** adds symbol to existing Pane using its own Scale
- **Add to Existing Scale:** adds symbol to existing pane using existing scale



Time Frame: this is a dropdown where you can find a time period that you'd like to view in your Chart

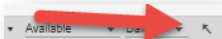


Interval: this is a list intervals that define what each data point represents



Drawing Tools: this is a dropdown where you can find the right technical tool to better understand the technical patterns underlying the security.

A full list of Drawing tools can be found in the appendix [here](#).



Studies: Each symbol and study has its own set of properties that can be modified. Certain symbol plot types (LINE and AREA charts) allow you to draw the symbol's plot based on a value other than the "Close." Some studies (such as, Bollinger Bands, Exponential Moving Average, and Momentum), perform their calculations using a specific value (Aspect) from the underlying data on which the study is applied. When the study is initially applied to a chart, it "binds" itself to this Aspect that is set in the study properties

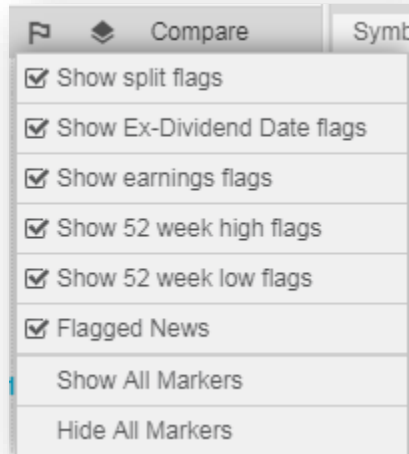
- **How to insert:** click on the Studies button on the Chart toolbar, then select the appropriate study
- **Change Chart Study Properties:** right click on the study's pane or titlebar and select Object Properties to display its properties.
- **Remove Study:**
 - o Right click and select Remove Study
 - o Click on study and hit DELETE key
 - o Click on study and click on X icon on the top right corner of the study

A full list of Studies can be found in the appendix [here](#).

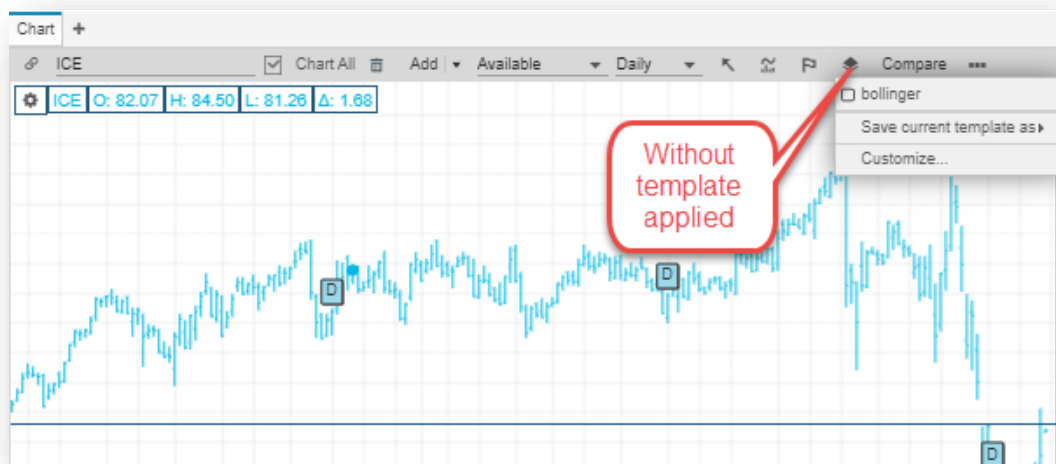


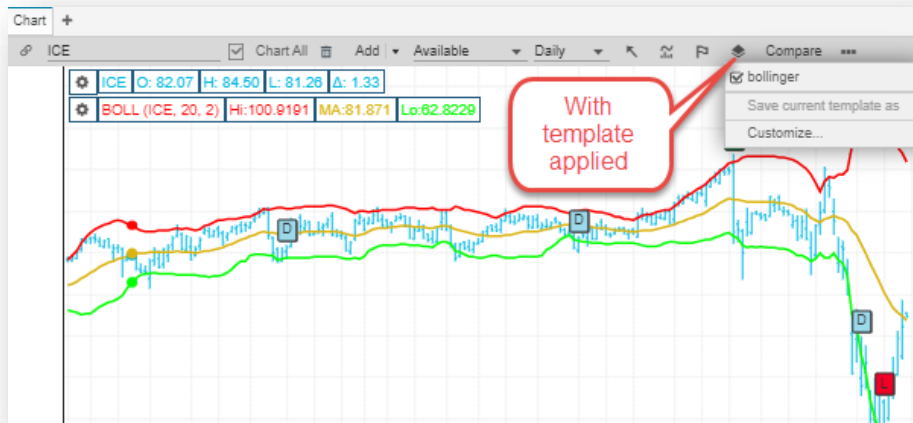
Flags: allows you to show certain corporate actions as icons in the Chart for any North American equity symbol in the shown timeframe in your Chart.

It only displays for Daily/weekly/Monthly intervals.



Templates: this allows you to customize and save and manage the details of a chart layout such as studies and tools



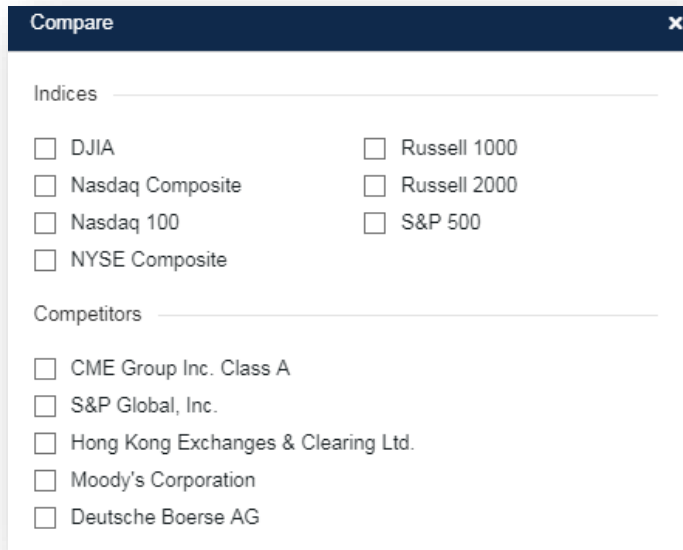


Compare: this is a selection of indices and competitors to a company that is in the primary plot of the Chart.

Competitors will only apply to North American Equities.

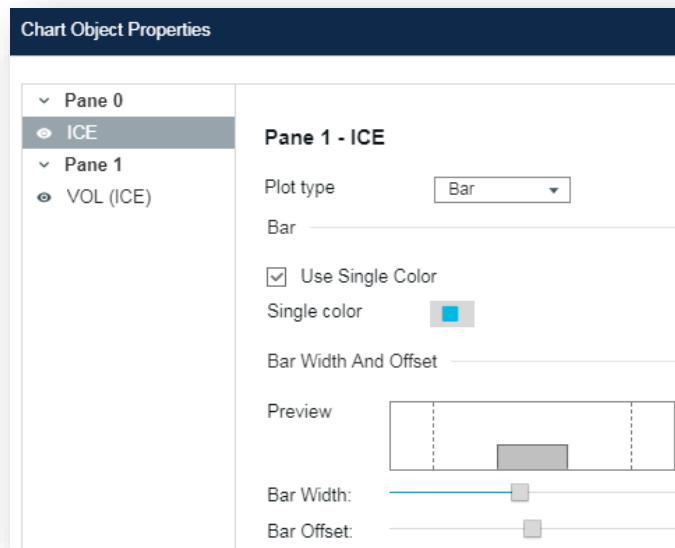
Indices and Competitors can be added to the Chart on the same Pane as the existing symbol or to its Pane, creating a new section.





More Icon: allows you additional options that could be found on the right click menu too:

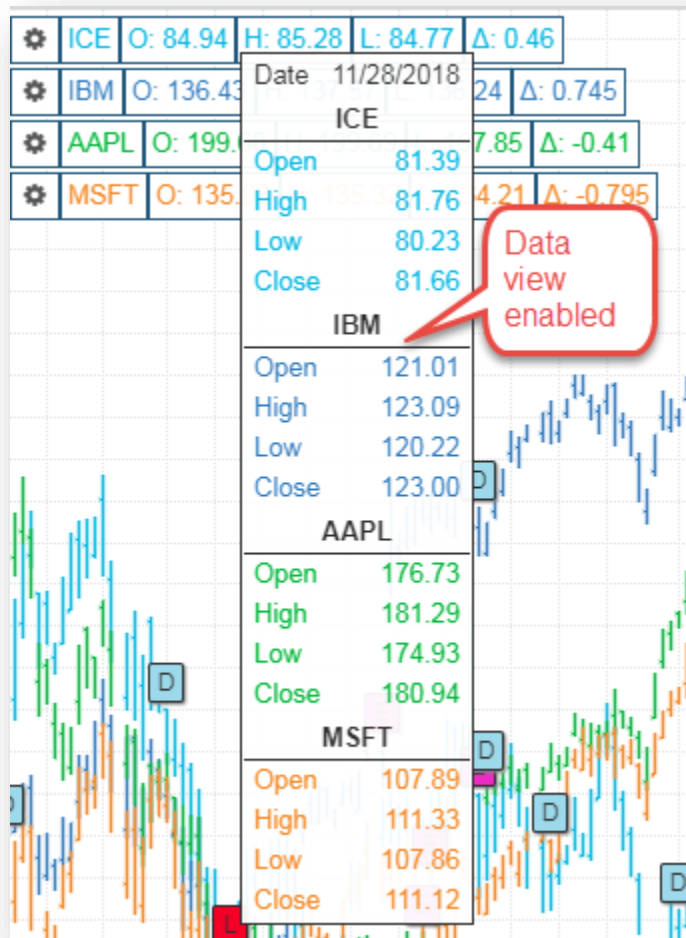
- **Chart Object Properties:** allows you to change the Chart Study's properties



- **Display Preferences:** allows you to adjust display preferences that will apply to all Chart widgets
- **Slider:** the time scale on the bottom of the Chart



- **Data View:** allows you to display or remove a floating view of the selected symbol's Open/High/Low/Close and its volume as your mouse moves over the Chart



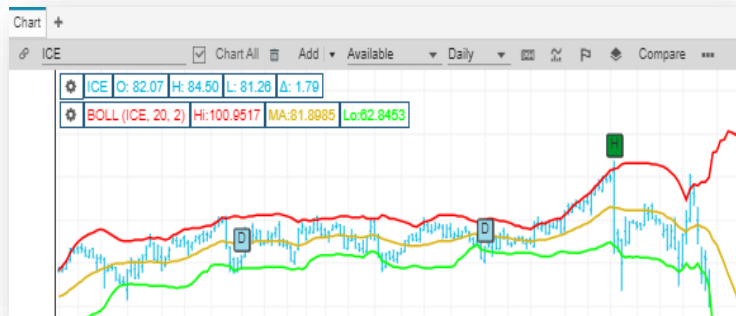
- **Snap:** By default, trendlines (for example, the **Lines** option in **Selection Tools**) snap to bar highs and lows when trendlines are added to a chart.

- **Snap to Studies:** allows any trendlines to snap to lines or studies.
- **Show full precision:** expands the precision of the Volume field showing the complete number over an abbreviated display (for instance, 645m instead of 645,000,000)



VS

- **Grid:** allows you to add or remove horizontal and or vertical grid lines



VS

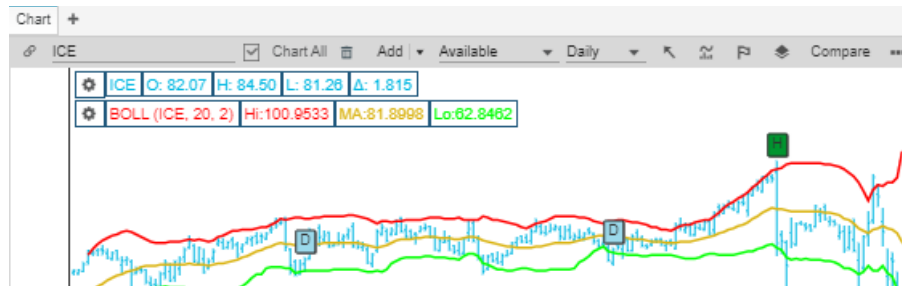
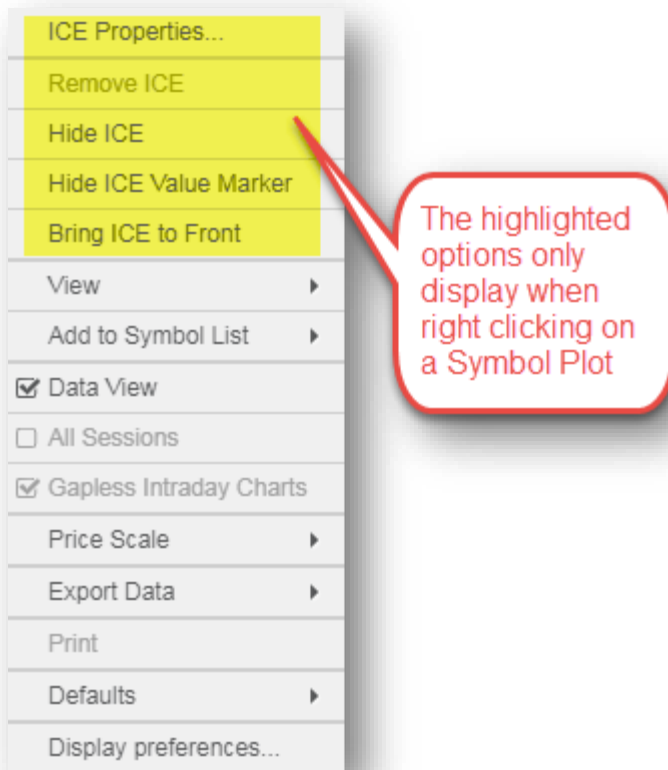
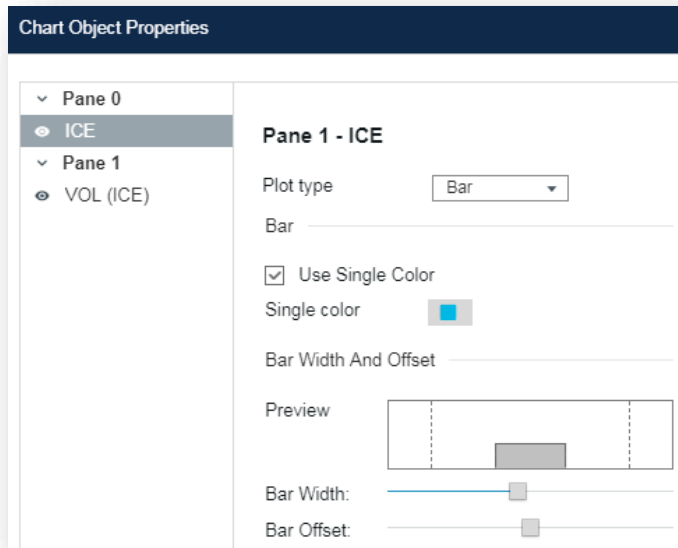


Chart Right Click



The Chart right click menu offers users quick access to some options

[Symbol] Properties: allows you to customize the plot type, color, and time scale bar width for each of the objects in each pane. This option only appears when right clicking the Chart Symbol Plot.



Remove [Symbol]: allows you to remove the selected symbol from Chart. This option only appears when right clicking the Chart Symbol Plot.

Hide [Symbol]: allows you to hide the selected symbol Plot from Chart, this is reversible by right clicking on the symbol header and selecting “Show [Symbol]”. This option only appears when right clicking the Chart Symbol Plot.

Hide [Symbol] Value Marker: hides the value marker of the selected symbol on the price scale. This option only appears when right clicking the Chart Symbol Plot.

Bring [Symbol] to Front: allows you to highlight the selected symbol plot to the forefront of the Chart

View: this allows you to view the selected symbol in another widget

Add to Symbol List: allows you to add the selected symbol to a Watch List you’ve created

Tracking: allows you to enable/disable different chart tracking options

- **Global Tracking:** allows tracking across multiple charts
- **Sticky Tracking:** tracking only changes when you click on the chart
- **Bar Tracking:** tracking on the plotted data only as you move the cursor
- **Cross Tracking:** horizontal tracking bar that adjusts vertically as you move your cursor over a chart
- **No Cursor Tracking:** no tracking when hovering the cursor over a chart

Data View: allows you to display or remove a floating view of the selected symbol's Open/High/Low/Close and its volume as your mouse moves over the Chart

Price Scale: allows you to choose to display different types of price scales:

- **Autoscale:** is the opposite of Lock Scale. In the case of a live chart that is still updating or if the user is scrolling across time and the range changes Autoscale will attempt to keep the entire chosen time range of the chart visible
- **Lock scale:** will fix the y-axis so that it does not move even if the price should move out of the visible part of the chart. This is useful if there is some horizontal element such as a stop limit that the user wants to remain in a fixed position
- **Percent:** divides the chart y-axis into 10% sections
- **Logarithmic:** divides the chart logarithmic scale (i.e. 1, 10, 100, 1000) which can aid visualization when the chart covers a large range of values

Export Data: allows you to export either all or just the visible data in your chart for your selected symbol into either ASCII text or Excel formats

Defaults: allows you to save and apply properties you've changed for your current Chart to other Chart widgets on a case by case basis

Display Preference: allows you to adjust display preferences that will apply to your current Chart widget

Chart Display Preferences

Accessed via right clicking anywhere on a Chart. Users can adjust to their preference:

Text & Colors: allows changes to the background color and selected object color

Plot Colors: allows changes to each of the plots as well as the type of plot types

Header/Footer: allows change for:

- **Chart Header:** this is a table that appears at the top of the Chart that identifies the symbol, Open, High, Low, Close, and Change. It also shows information about all studies applied to the chart
 - Show symbol in Chart Header
 - Show Company Name in Chart Header
 - Show Data Cells
 - Wrap Headers
- **Chart Footer:** this will show Symbol Summary information. If the user clicks on some part of the chart line then the Symbol Summary information from that point in time will be displayed.
 - Show Footer

Markers and Flags: allows change for:

- **Markers**
 - Symbol value marker and location
 - Study value marker and location
- **Flags:** text and color changes for:
 - Split flag
 - Dividend flag
 - Earnings flag
 - 52 weeks high flag
 - 52 weeks low flag



Grid Lines: allows you to set preferences to gridline, colors and/or style

Grid Lines

Show Horizontal Gridlines

Show Vertical Gridlines

Grid Color

Grid Style Dotted

- **Show horizontal gridlines:** displays horizontal lines in your Chart gridline
- **Show vertical gridlines:** displays vertical lines in your Chart gridline
- **Grid color:** allows you to change the color of the gridlines
- **Grid style:** allows you to change the display of the gridlines in the following options:
 - Solid
 - Dotted
 - Dashed
 - Dashed-dot-dash
 - Dot-dot-dash

Formatting: Show full precision: expands the precision of the Volume field showing the complete number over an abbreviated display (for instance, 645m instead of 645,000,000)



VS

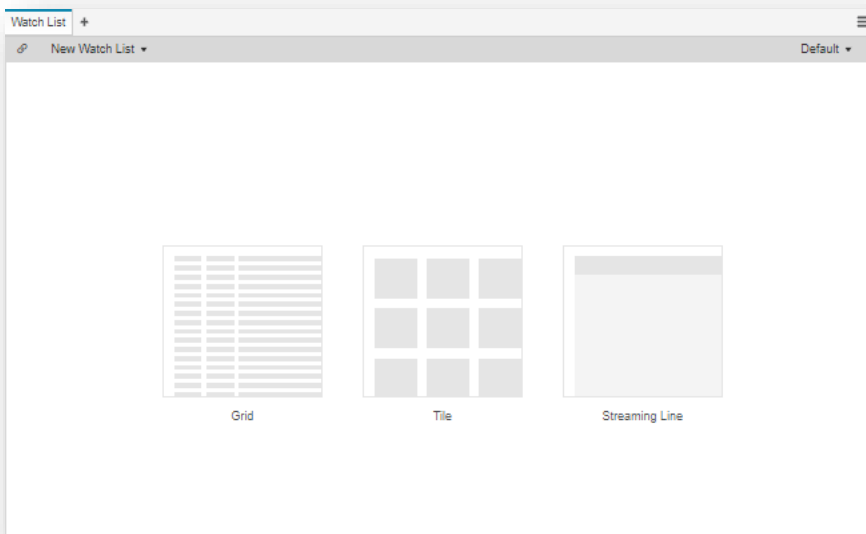
Watchlist

The Watch List Table displays a list of symbols that you would like to track with associated data points in a table format. There are also two other views, tile view and streaming line view which allow you to track symbols with different formats. The column headings (data points) are configurable and the symbols can link to other windows such as the chart, news, and detailed quote widgets.



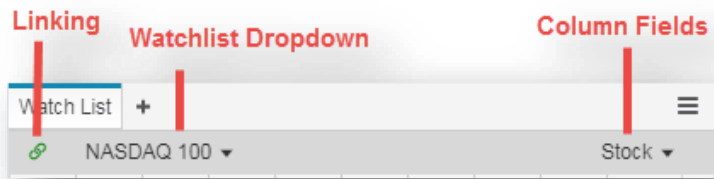
Symbol	Last	Net Cha...	Open	Bid	Ask	High	Low	Volume	Time
SNDX [15]	7837.33	+113.27	7784.29			7847.52	7772.44	0	14:32:21
ATVI [15]	47.00	-2.55	48.20	47.00	47.01	48.67	46.16	21.5M	14:32:19
ADBE [15]	285.42	+5.78	282.56	285.39	285.45	286.35	282.39	1.16M	14:32:19
AMD [15]	28.19	-0.11	28.30	28.18	28.19	28.36	27.66	41.3M	14:32:21
ALGN [15]	330.27	+4.39	328.86	330.18	330.33	333.17	327.27	622K	14:32:21
ALXN [15]	135.86	+2.73	134.00	135.83	135.91	136.10	133.46	386K	14:32:19
AMZN [15]	1961.96	+61.14	1949.00	1961.83	1962.22	1964.40	1936.00	4.84M	14:32:21
AMGN [...]	177.20	+0.70	176.93	177.17	177.21	177.77	176.47	1.67M	14:32:16
AAL [15]	34.75	+0.80	34.21	34.74	34.75	34.89	34.15	3.41M	14:32:19
ADI [15]	116.82	-0.14	117.58	116.81	116.82	117.96	115.93	1.83M	14:32:14
AAPL [15]	211.29	+2.14	210.89	211.28	211.30	211.70	210.23	14.3M	14:32:21
AMAT [15]	43.92	+0.22	44.03	43.91	43.92	44.15	43.61	4.44M	14:32:19
ASML [15]	207.79	+1.86	206.77	207.76	207.93	208.26	206.22	254K	14:32:15
ADSK [15]	176.55	+3.19	174.72	176.50	176.58	176.76	174.06	490K	14:32:17
ADP [15]	160.07	+1.65	159.69	160.03	160.06	160.63	158.51	561K	14:32:05
AVGO [15]	314.65	-1.17	314.95	314.57	314.71	315.86	310.69	1.04M	14:32:20

Watchlist View Selection



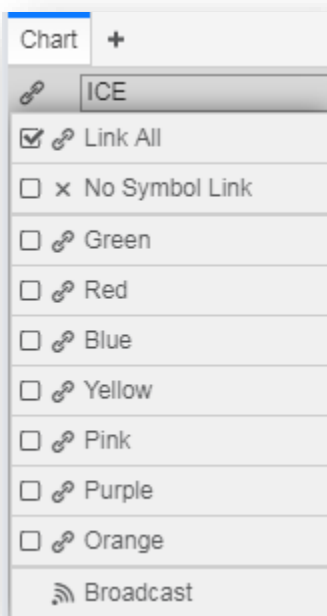
View Selection: allows you to select a view when opening the widget

Watch List Title Bar



Linking:

Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

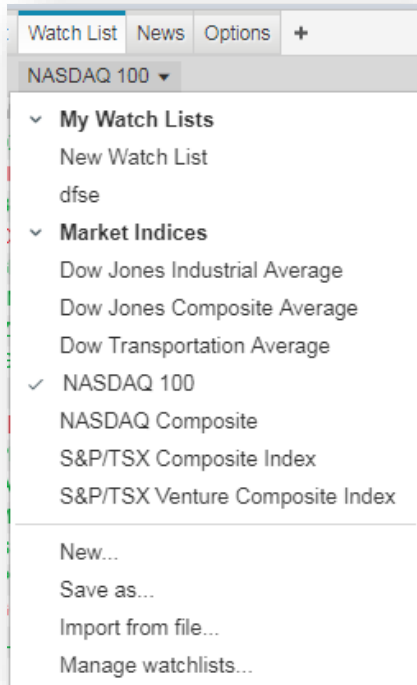
No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Watchlist to Green Chart

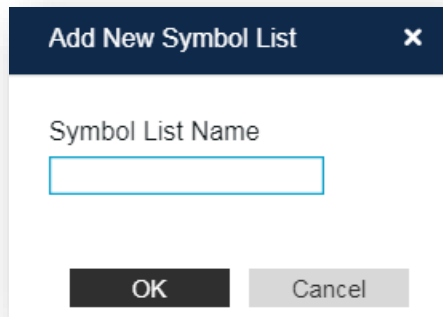
Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Watch List Selection Menu: allows viewing and selecting your saved Watch Lists and predefined Market Indices.

There is a section on the bottom to create new, save, import and manage your watchlists



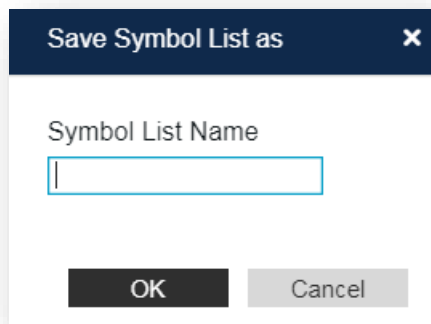
New: option to create a new watchlist, you'd be prompted to name your new watchlist and then you'd be able to start adding your symbols to the newly created watchlist



The dialog box has a dark blue header with the text "Add New Symbol List" and a close button (X) on the right. Below the header, the text "Symbol List Name" is followed by a text input field. At the bottom, there are two buttons: "OK" (dark blue) and "Cancel" (light gray).

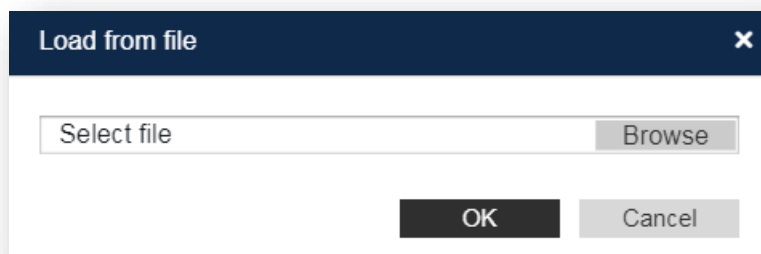
Save As: allows you to make a copy of an existing watchlist, except for the Market Indices watchlists.

You'd be prompted to name your new watchlist



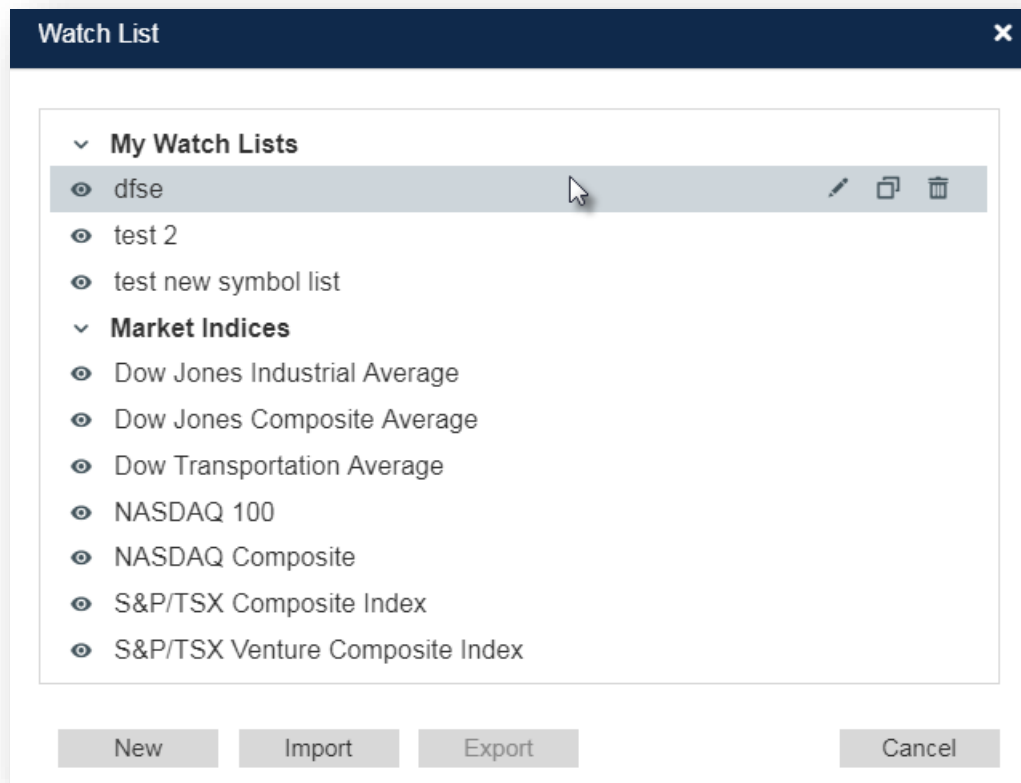
The dialog box has a dark blue header with the text "Save Symbol List as" and a close button (X) on the right. Below the header, the text "Symbol List Name" is followed by a text input field. At the bottom, there are two buttons: "OK" (dark blue) and "Cancel" (light gray).

Import from file: option to load a watchlist from a file on your computer. The format must be a text file.



The dialog box has a dark blue header with the text "Load from file" and a close button (X) on the right. Below the header, there is a text input field containing "Select file" and a "Browse" button to its right. At the bottom, there are two buttons: "OK" (dark blue) and "Cancel" (light gray).

Manage Watchlists: allows adding/editing watchlists as well as option to manually hide watchlists from the Watchlist Dropdown






The New button allows you to create a new watchlist. You'd be prompted to name the new watchlist and it will appear in your "My Watch Lists" list

The Import button allows you to import a text file as a watchlist and it will appear in your "My Watch Lists" list

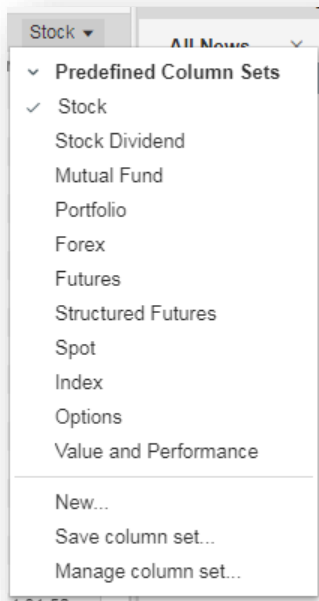
The Export button allows you to export a watchlist as a .csv format.

Hovering over any of your watchlists in the "My Watch Lists" section will highlight it in grey and icons options appear:

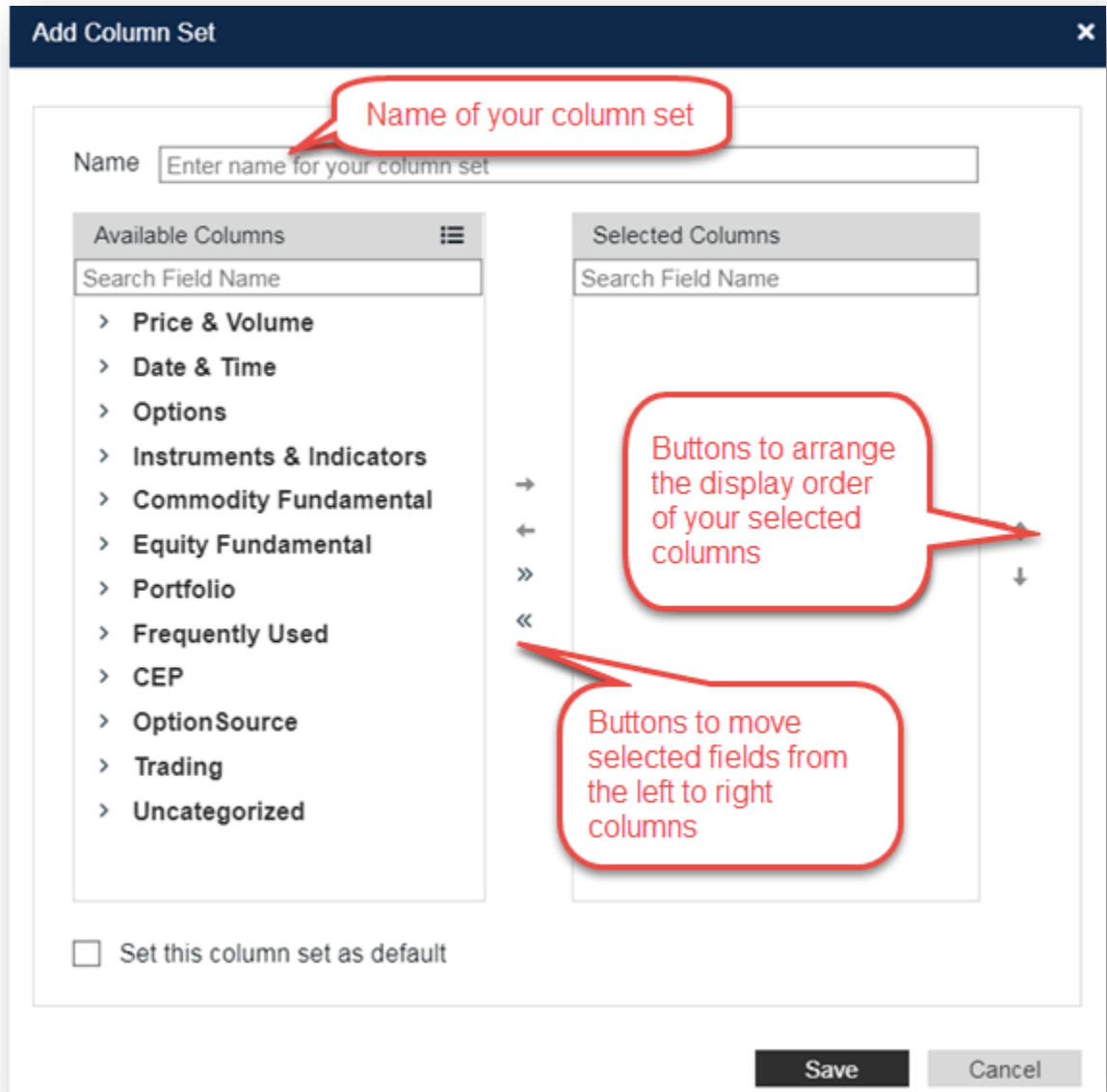
-  to edit the highlighted watchlist name
-  to create a copy the highlighted watchlist
-  to delete the highlighted watchlist

Column Fields: allows viewing and selecting predefined columns sets.

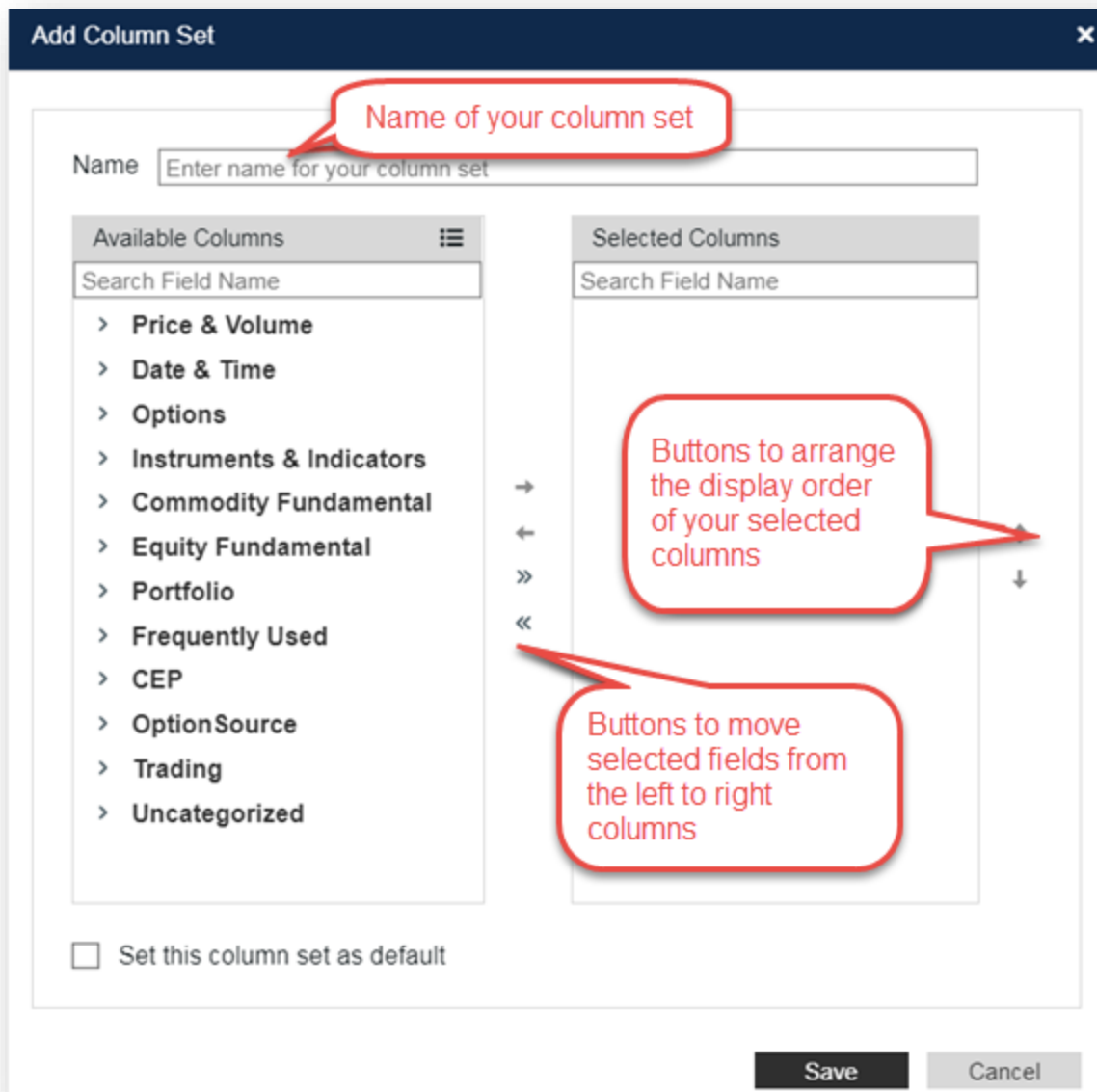
There is a section on the bottom to create new, save and manage column sets



New: this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.



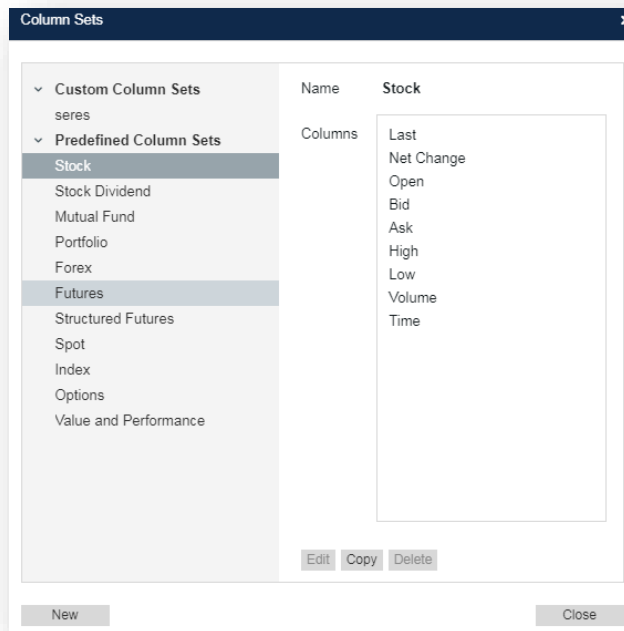
Save as: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns

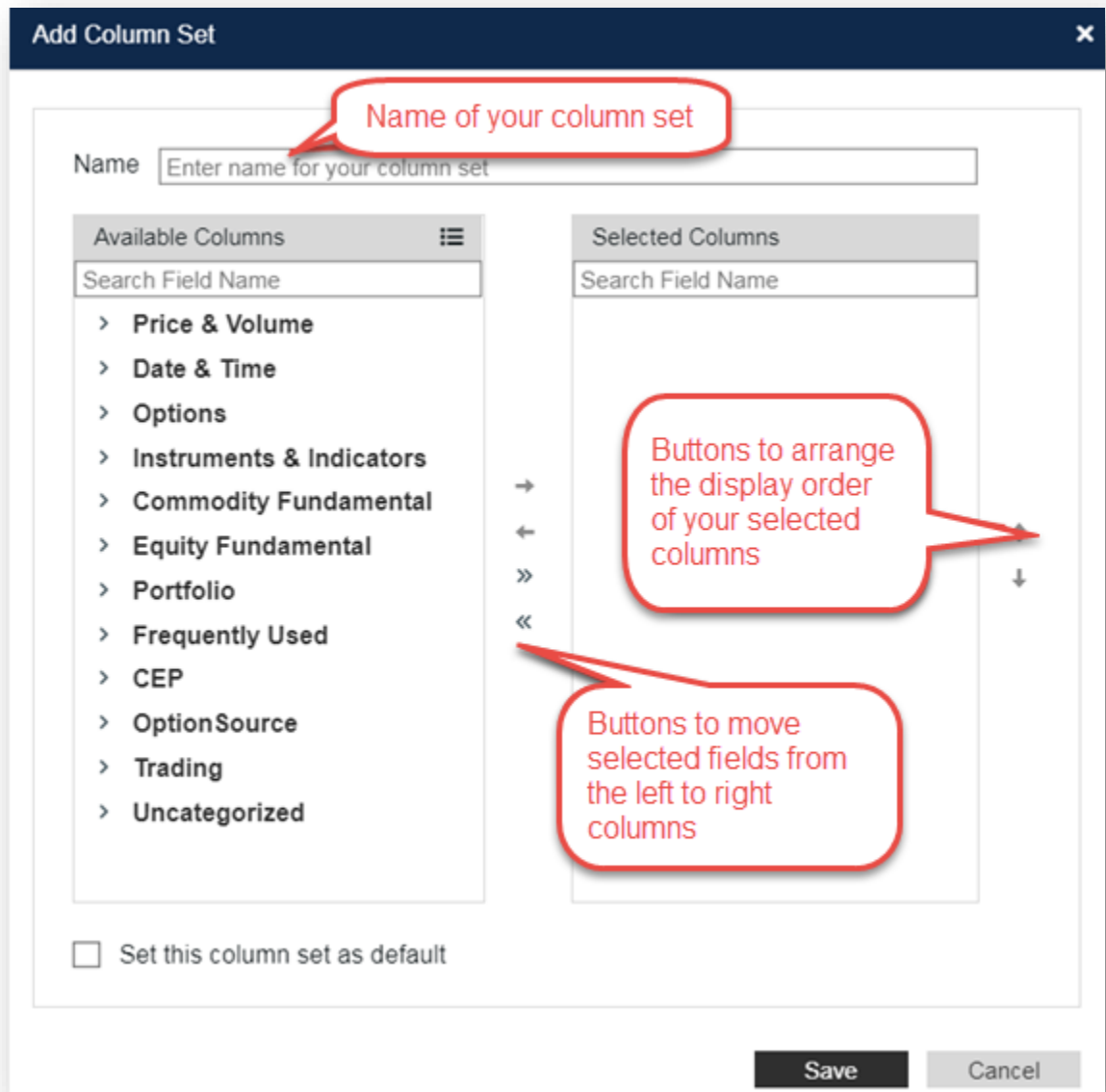


Managing Column Sets: allows you to update your Custom Column Set by:

- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.

- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side





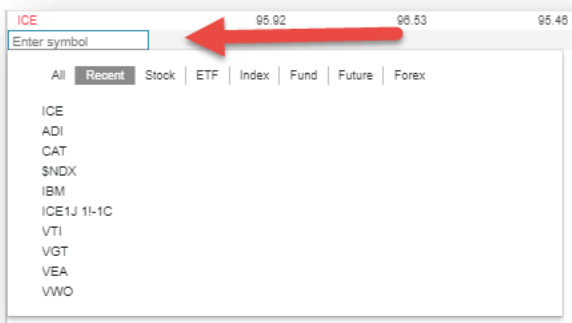
Watch List Grid View

The Watch List Table displays a list of symbols that you would like to track with associated data points in a table format.



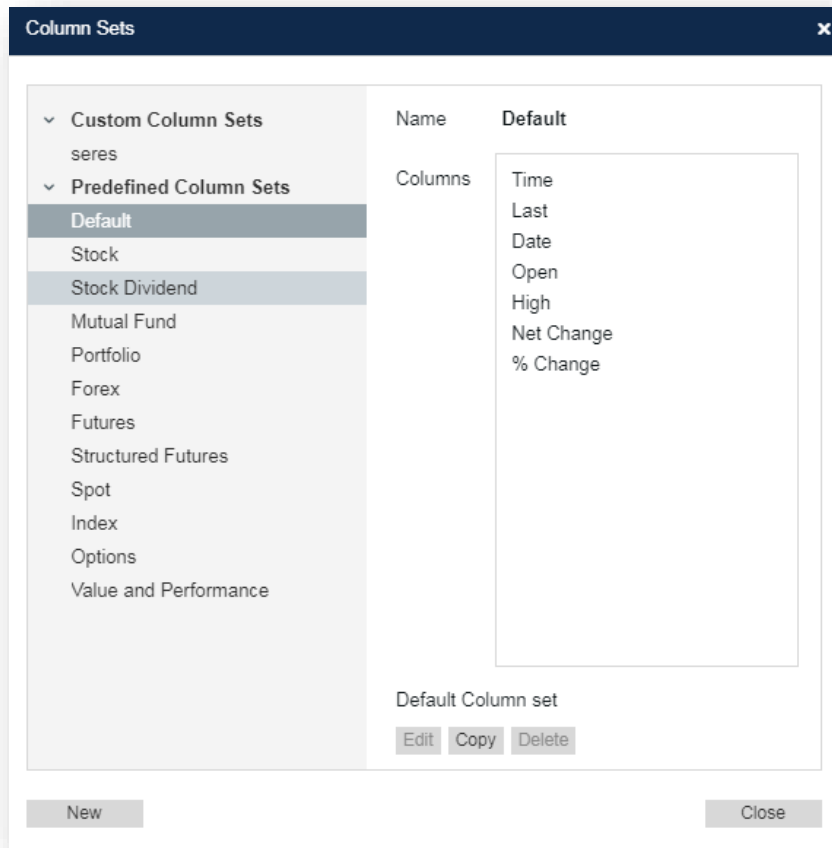
Symbol	Last	Net Cha...	Open	Bid	Ask	High	Low	Volume	Time
SNDX [15]	7837.33	+113.27	7784.29			7847.52	7772.44	0	14:32:21
ATVI [15]	47.00	-2.55	48.20	47.00	47.01	48.67	46.16	21.5M	14:32:19
ADBE [15]	285.42	+5.78	282.56	285.39	285.45	286.35	282.39	1.16M	14:32:19
AMD [15]	28.19	-0.11	28.30	28.18	28.19	28.36	27.66	41.3M	14:32:21
ALGN [15]	330.27	+4.39	328.86	330.18	330.33	333.17	327.27	622K	14:32:21
ALXN [15]	135.86	+2.73	134.00	135.83	135.91	136.10	133.46	386K	14:32:19
AMZN [15]	1961.96	+61.14	1949.00	1961.83	1962.22	1964.40	1936.00	4.84M	14:32:21
AMGN [...]	177.20	+0.70	176.93	177.17	177.21	177.77	176.47	1.67M	14:32:16
AAL [15]	34.75	+0.80	34.21	34.74	34.75	34.89	34.15	3.41M	14:32:19
ADI [15]	116.82	-0.14	117.58	116.81	116.82	117.96	115.93	1.83M	14:32:14
AAPL [15]	211.29	+2.14	210.89	211.28	211.30	211.70	210.23	14.3M	14:32:21
AMAT [15]	43.92	+0.22	44.03	43.91	43.92	44.15	43.61	4.44M	14:32:19
ASML [15]	207.79	+1.86	206.77	207.76	207.93	208.26	206.22	254K	14:32:15
ADSK [15]	176.55	+3.19	174.72	176.50	176.58	176.76	174.06	490K	14:32:17
ADP [15]	160.07	+1.65	159.69	160.03	160.06	160.63	158.51	561K	14:32:05
AVGO [15]	314.65	-1.17	314.95	314.57	314.71	315.86	310.69	1.04M	14:32:20

How to enter symbols: you can enter a new symbol in the grid view by clicking on a cell in the symbol column and typing the symbol

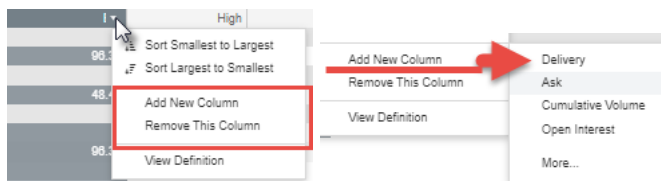


How to add/delete columns:

- From the [Manage Column Set](#) dropdown menu from the top right corner of the widget




- **From the column heading dropdown:** allows you to remove a column, or add columns inline



How to create section dividers:

- Collapsible/Expandable Header -- type “#” and header title
- Left Header -- type “##” and header title
- Center Header -- type “###” and header title

▼ TEST COLLAPSE HEADER				
S [15]	16:18:35	6.02	05/12/2019	6.02
S [15]	16:18:35	6.02	05/12/2019	6.02
TEST LEFT HEADER				
F [15]	16:18:53	10.08	05/12/2019	10.17
S [15]	16:18:35	6.02	05/12/2019	6.02
S [15]	16:18:35	6.02	05/12/2019	6.02
TEST CENTER HEADER				
D [15]	16:16:24	75.60	05/12/2019	74.31
D [15]	16:16:24	75.60	05/12/2019	74.31
▶ TEST COLLAPSE HEADER				

Sorting: you can sort columns by double clicking on the column name or clicking on the  icon of the column and choosing which direction you'd like to sort by

Last	Date
157.3	
75.6	Sort smallest to largest
10.0	Sort largest to smallest

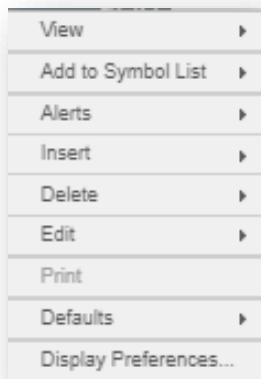
Column Heading Definition: allows you to see the definition for a column by clicking on the dropdown on the column heading and selecting view definition

Bid	High
98.3	
48.6	
98.3	

- Sort Smallest to Largest
- Sort Largest to Smallest
- Add New Column
- Remove This Column
- View Definition

Bid	High
Bid (B)	
Bid price (highest available buying price)	

Watch List Grid View Right Click



View: this allows you to view the selected symbol in another widget

Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

Alerts: allows you to create an alert carrying the symbol clicked on

Insert: allows you to insert rows or columns to your watchlist

Delete: allows you to remove the selected columns, row or contents in the row from the grid

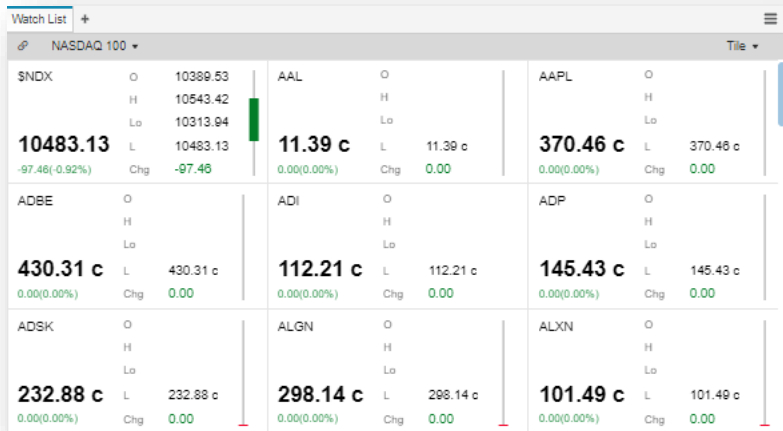
Edit: allows you to copy data as text, select all the data in the grid, and resize your columns

Defaults: allows you to save and apply properties you've changed for your current Watch List to other Watch List widgets on a case by case basis

Display Preference: allows you to adjust display preferences that will apply to your current Watch List widget

Watch Tile View

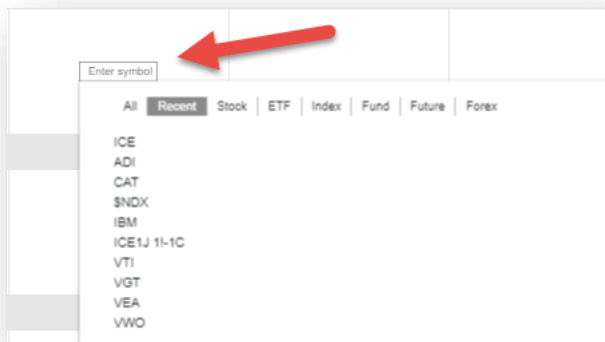
The tile view displays a list of symbols that you would like to track with the ability to customize the associated data points, with each symbol displaying as its own tile on the grid.



The screenshot shows a 'Watch List' window with a 'Tile' dropdown menu. The window displays a grid of nine stock symbols, each with its own data points. The symbols are \$NDX, AAL, AAPL, ADBE, ADI, ADP, ADSK, ALGN, and ALXN. Each tile shows the current price, high, low, and change. For example, \$NDX is at 10483.13, down 97.46 (-0.92%). AAL is at 11.39 c, up 0.00 (0.00%). AAPL is at 370.46 c, up 0.00 (0.00%).

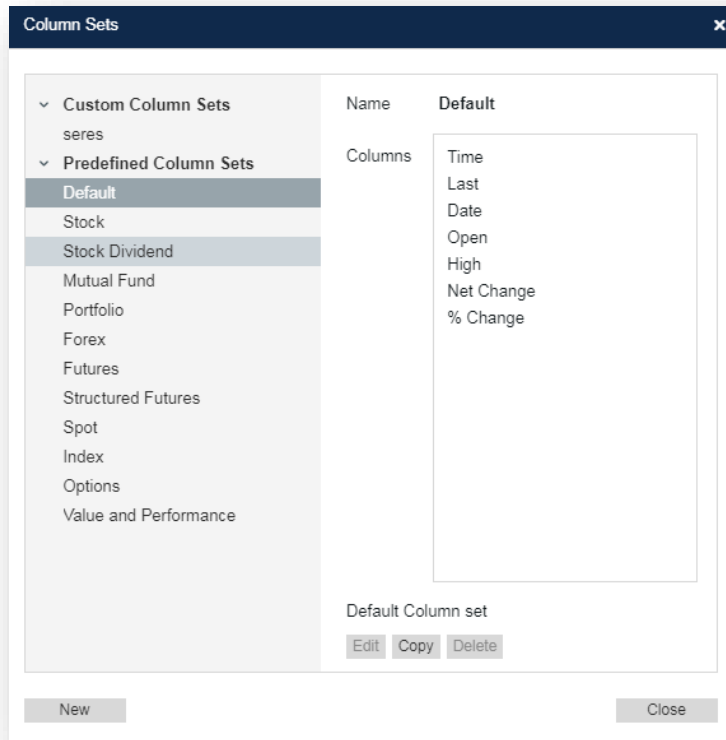
Symbol	High	Low	Change	Change %
\$NDX	10483.13	10313.94	-97.46	-0.92%
AAL	11.39 c	11.39 c	0.00	0.00%
AAPL	370.46 c	370.46 c	0.00	0.00%
ADBE	430.31 c	430.31 c	0.00	0.00%
ADI	112.21 c	112.21 c	0.00	0.00%
ADP	145.43 c	145.43 c	0.00	0.00%
ADSK	232.88 c	232.88 c	0.00	0.00%
ALGN	298.14 c	298.14 c	0.00	0.00%
ALXN	101.49 c	101.49 c	0.00	0.00%

How to enter symbols: you can enter a new symbol into your watchlist by clicking on a cell in the Symbol column and typing your selected symbol



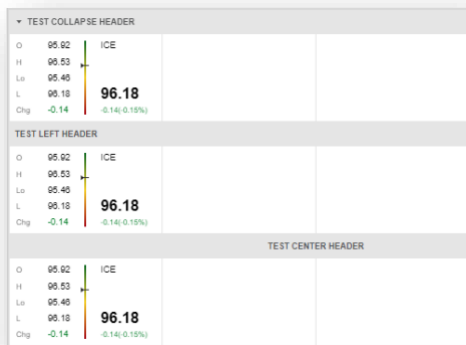
How to add/delete columns:

- From the [Manage Column Set](#) dropdown menu from the top right corner of the widget



How to create section dividers:

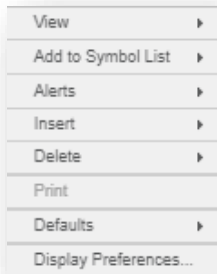
- Just like the grid view, this works similar in the tile view by entering the following into tiles symbol entry field
 - o Collapsible/Expandable Header -- type “#” and header title
 - o Left Header -- type “##” and header title
 - o Center Header -- type “###” and header title



Removing symbols: clicking the delete key allows you to remove the symbol clicked on, holding shift while selecting tiles and clicking the delete key allows you to remove multiple symbols

Dragging and Dropping Symbols: allows you to drag symbols from the tiles to other widgets, clicking on a single tile or clicking on multiple and holding shift will allow you to drag and drop one or multiple symbols to other widgets

Watch List Tile View Right Click



View: this allows you to view the selected symbol in another widget

Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

Alerts: allows you to create an alert carrying the symbol clicked on

Insert: allows you to insert tiles to the left or right, and rows or columns in either direction based on the tile you clicked in

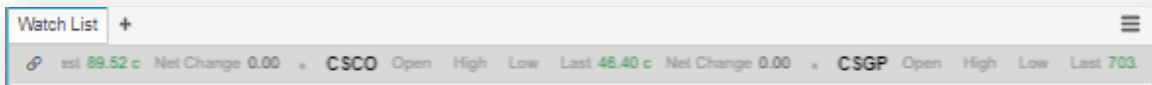
Delete: allows you to remove the selected tiles and shift tiles left or up, or remove an entire row or column based on the tile you clicked in

Defaults: allows you to save and apply properties you've changed for your current Watch List to other Watch List widgets on a case by case basis

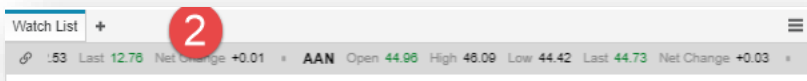
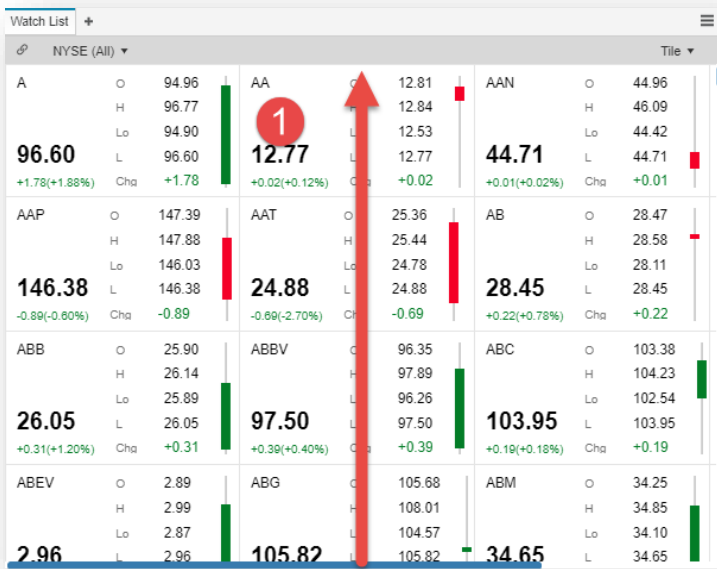
Display Preference: allows you to adjust display preferences that will apply to your current Watch List widget

Watch Streaming Line View

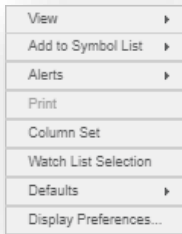
The tile view displays a list of symbols that you would like to track with the ability to customize the associated data points that scrolls in a single line



Dynamic Resizing: allows you to resize a grid or tile view into the streaming line view by dragging the bottom of the widget to the tool bar to view the streaming line view



Watch List Streaming Line View Right Click

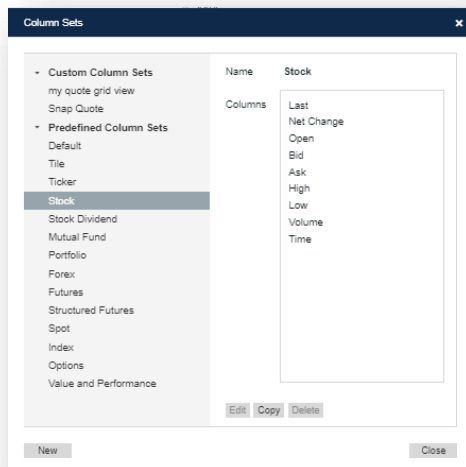


View: this allows you to view the selected symbol in another widget

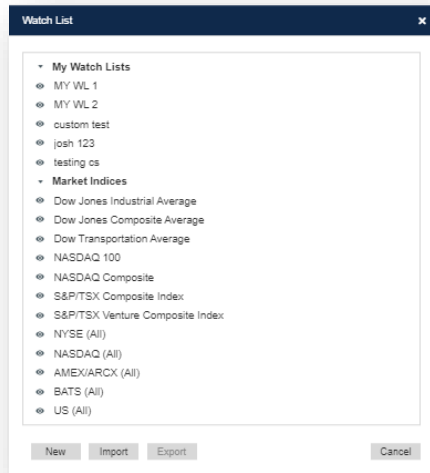
Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

Alerts: allows you to create an alert carrying the symbol clicked on

Column set: allows you to open the column set manager window to edit displayed data points for symbols on the streaming line



Watchlist Selection: allows you to open the watchlist selection window to select watchlists to display in the streaming line



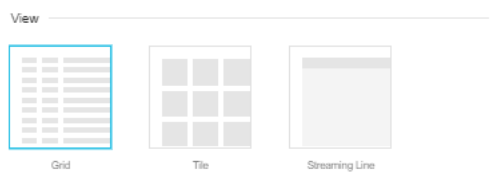
Defaults: allows you to save and apply properties you've changed for your current Watch List to other Watch List widgets on a case by case basis

Display Preference: allows you to adjust display preferences that will apply to your current Watch List widget

Watch List Display Preferences

Accessed via right clicking anywhere on a Watch List. Users can adjust to their preference for:

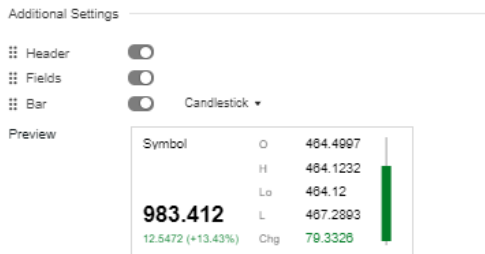
Views: allows you to switch views of the watchlist widget from within an open widget



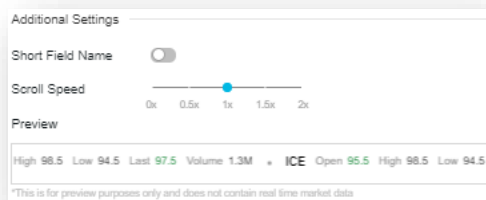
Views - Tile: allows you to enable/disable and or rearrange the order of the Header, Fields, and Bar as well as see a preview tile

- Header: contains symbol, last price, and change/%change
- Fields: data points from the selected column set

- **Bar:** visual bar that can be displayed from the following options: candlestick, thermometer, thermoboard



Views - Streaming Line: allows you to enable/disable short field names, and adjust the scroll speed of the streaming line, as well as view a preview of the streaming line



Auto-Sort: allows you to set an interval to auto sort by in minutes based on a previously sorted column

Symbol Field: allows preference changes for:

- Show symbol as description
- Click action -- what happens when you click on a symbol cell
- Double click action -- what happens when you double click on a symbol cell
- Show 52 week high/low indicators
- Activity indicator color

Formatting:

- Sync field column widths in summary mode
- Show full precision on non-trade data: non-trade data refers to non-pricing data like Volume
- Show full precision on trade data: trade data refers to pricing data like Last

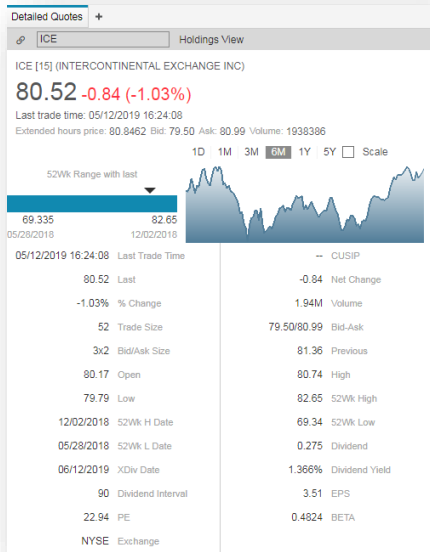
52 Week Indicator:

- Font color

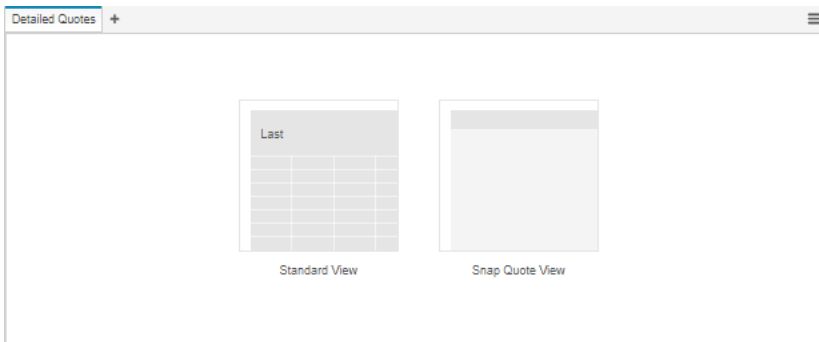
- Outline color
- Slider color
- Fill color

Detailed Quotes

The Detailed Quote widget allows you to see in-depth information on an instrument. The fields and their locations are configurable. There are also several layouts that you can use found in display properties. The Holdings View will appear in the title bar if the instrument in view also resides on a custom saved Watch List. There is also a Snap quote view which will allow you to get some of the same functionality with less real estate.

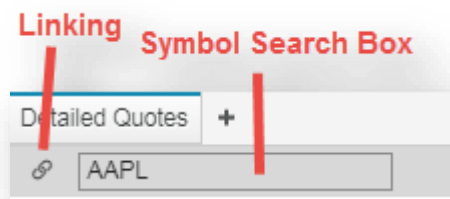


Detailed Quote View Selection



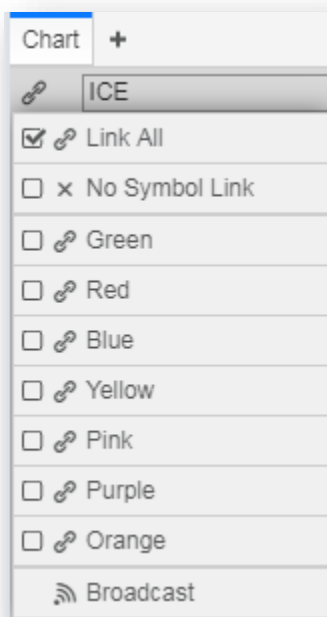
View Selection: allows you to select a view when opening the widget

Detailed Quote Title Bar



Linking:

Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

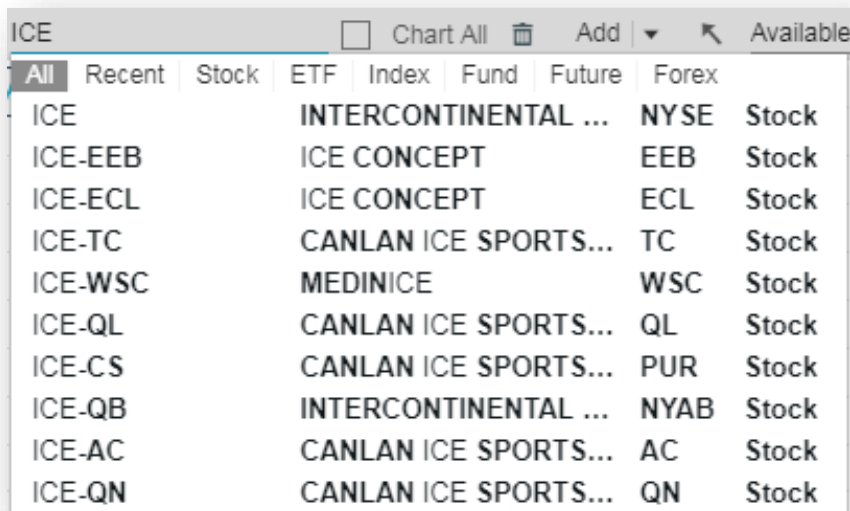
No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Watchlist to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Symbol Search Box: this is our symbol entry and symbol search entry point. Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund
- Future
- Forex



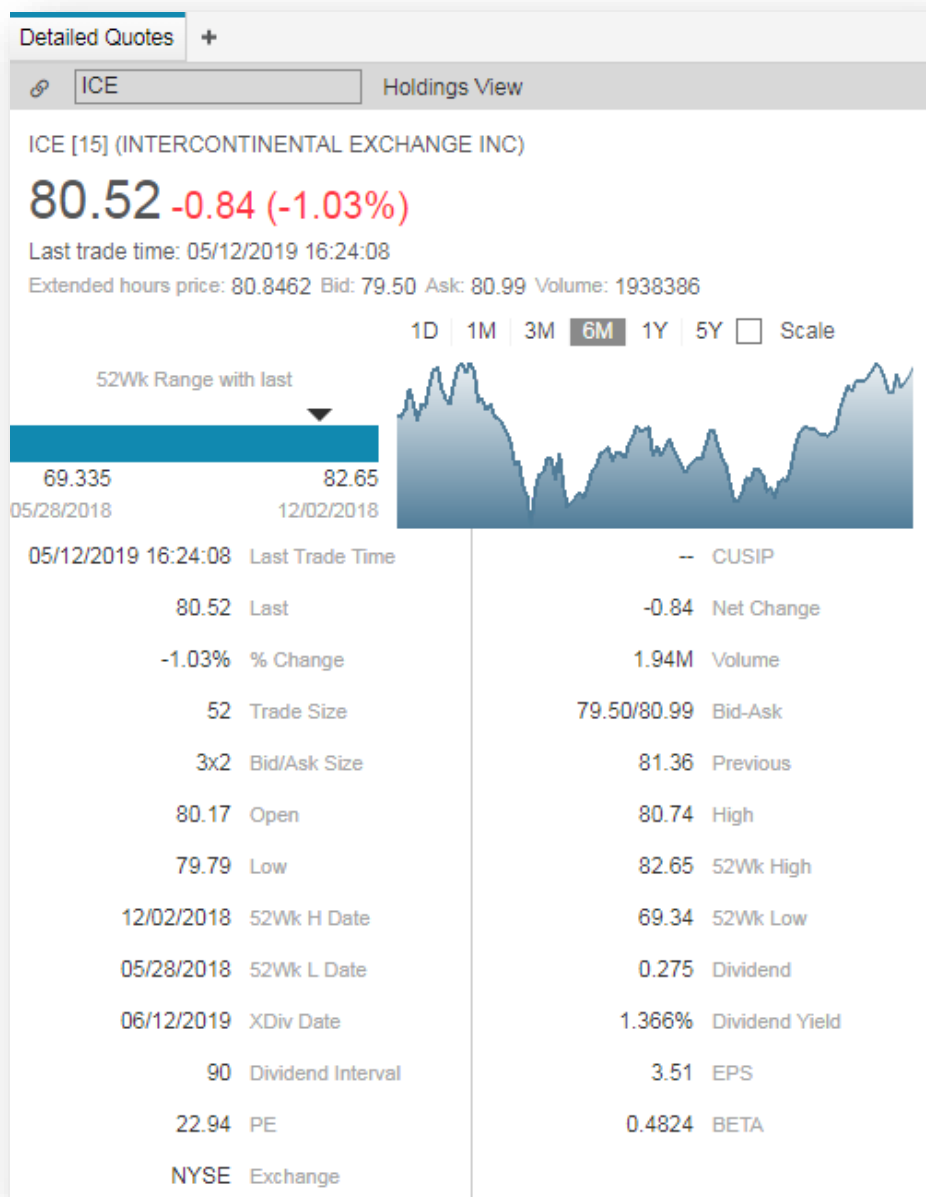
The screenshot shows a search results window titled "ICE". At the top, there are navigation options: "Chart All", "Add", and "Available". Below this is a tabbed interface with "All" selected, and other tabs for "Recent", "Stock", "ETF", "Index", "Fund", "Future", and "Forex". The main content area displays a list of search results for "ICE". Each row contains a search term, a description, a symbol, and a category.

Search Term	Description	Symbol	Category
ICE	INTERCONTINENTAL ...	NYSE	Stock
ICE-EEB	ICE CONCEPT	EEB	Stock
ICE-ECL	ICE CONCEPT	ECL	Stock
ICE-TC	CANLAN ICE SPORTS...	TC	Stock
ICE-WSC	MEDINICE	WSC	Stock
ICE-QL	CANLAN ICE SPORTS...	QL	Stock
ICE-CS	CANLAN ICE SPORTS...	PUR	Stock
ICE-QB	INTERCONTINENTAL ...	NYAB	Stock
ICE-AC	CANLAN ICE SPORTS...	AC	Stock
ICE-QN	CANLAN ICE SPORTS...	QN	Stock

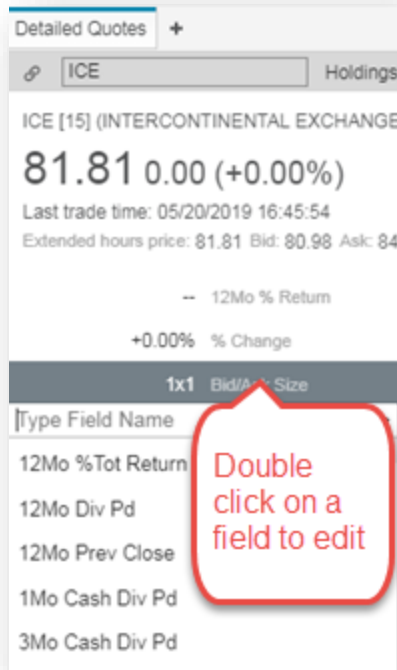
Detailed Quote Standard View

The Detailed Quote widget allows you to see in-depth information on an instrument. The fields and their locations are configurable. There are also several layouts that you can

use found in display properties. The Holdings View will appear in the title bar if the instrument in view also resides on a custom saved Watch List.



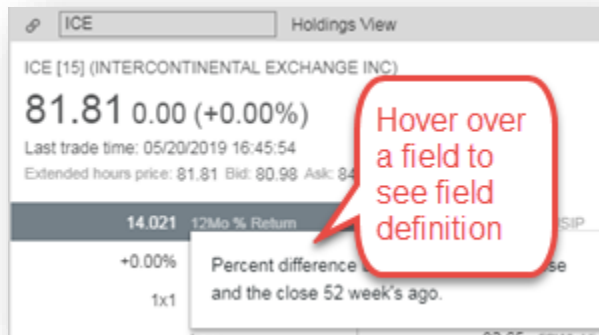
How to change individual fields: double click on field to display list of available fields for your symbol



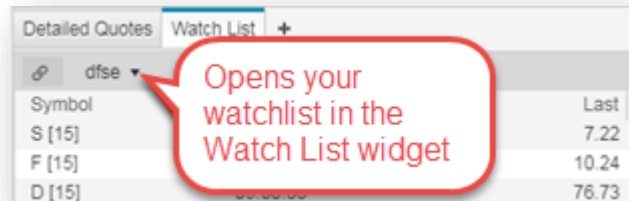
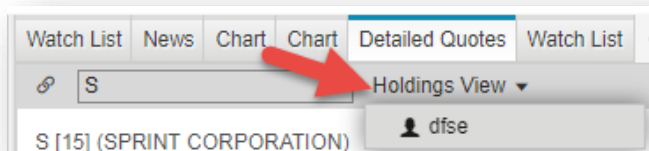
Drag and Drop Fields: Click, hold, and drag fields to rearrange them



Hover over definition: hovering your mouse over a field will display the field definition



Holdings view: allows you to jump to one of your watch lists where your security is present



Detailed Quote Standard View Right Click

View	▶
Add to Symbol List	▶
Alerts	▶
Font Size	▶
Font Color	▶
<input type="checkbox"/> Bold	
<input type="checkbox"/> Italic	
Insert	▶
Delete	▶
Fields	▶
Print	
Defaults	▶
Display Preferences...	

View: this allows you to view the selected symbol in another widget

Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

Alerts: allows you to create an alert carrying the symbol clicked on

Font Size: allows changing the font size of the selected field

Font Color: allows changing the font color of the selected field

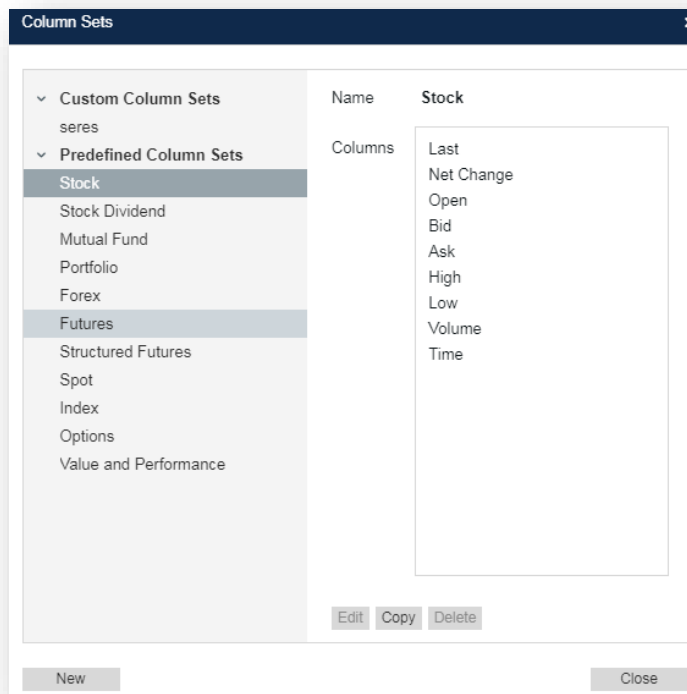
Bold: allows bolding the font of the selected field

Italic: allows you to italicize the font of the selected field

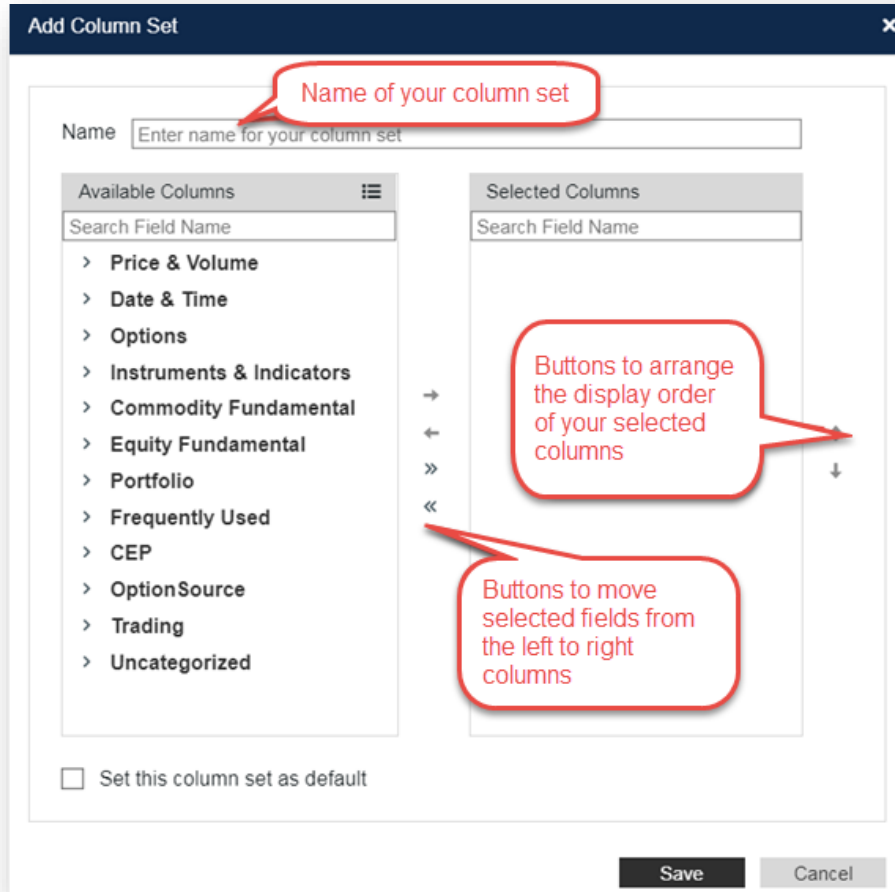
Insert: allows you to insert a cell before or after the selected field

Delete: allows you to delete the selected field or delete the content of the selected field

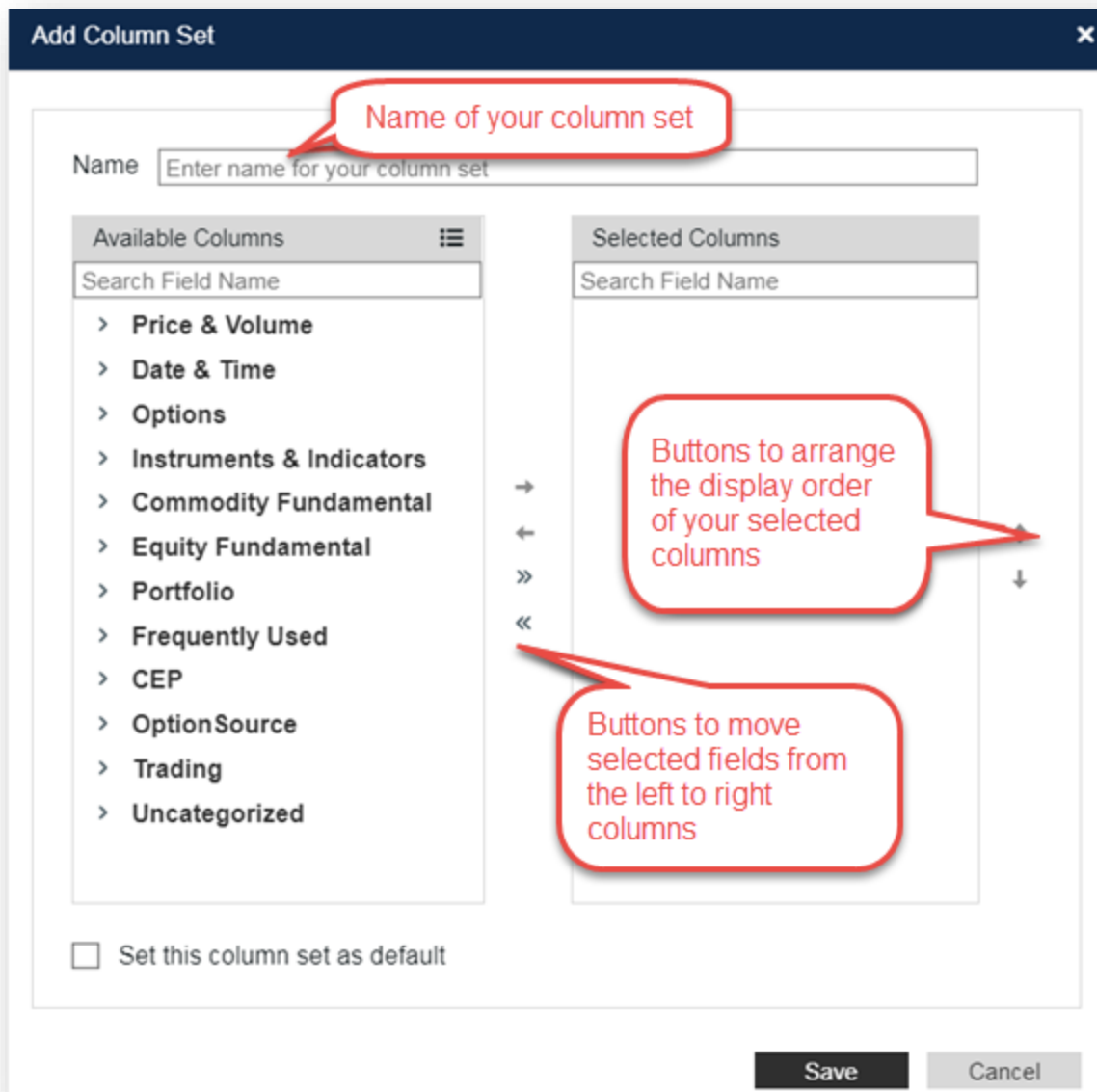
Fields: allows viewing and selecting predefined columns sets, clicking "customize" will open the fields menu that allows you to create new, save and manage column sets



New...: this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.



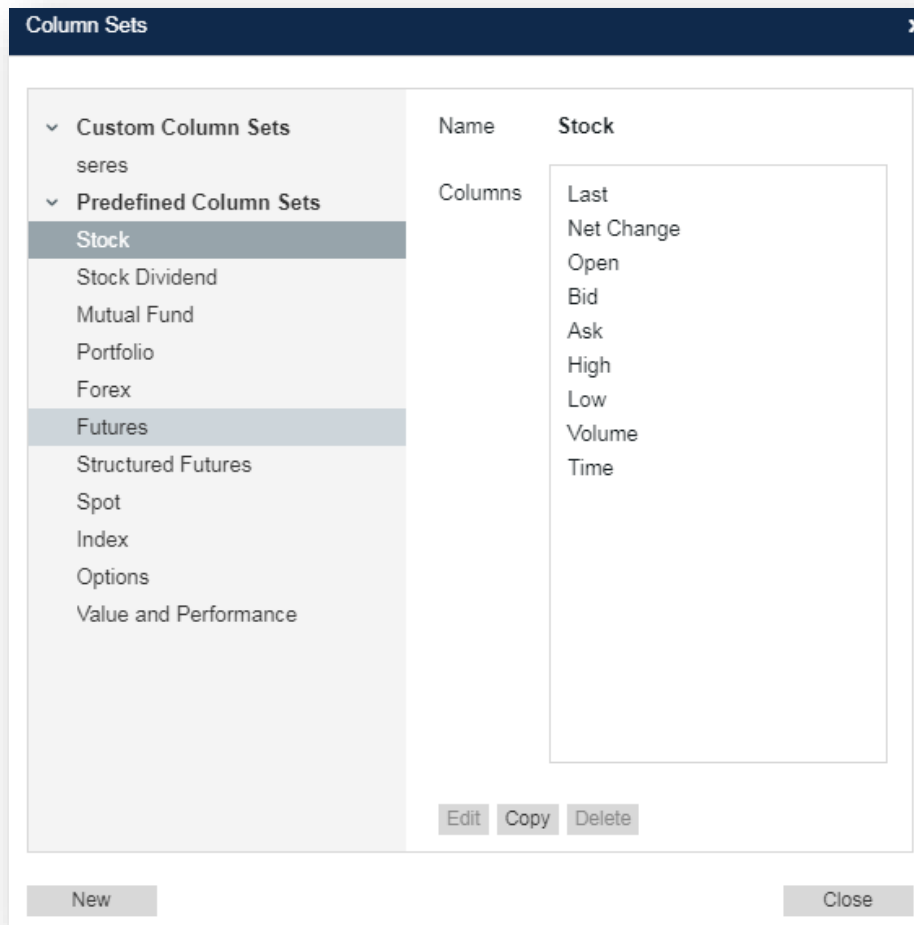
Save as...: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns



Managing Column Sets: allows you to update your Custom Column Set by:

- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.

- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side

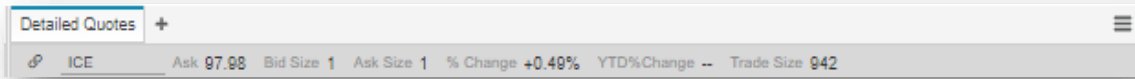


Defaults: allows you to save and apply properties you've changed for your current Detailed Quotes to other Detailed Quotes widgets on a case by case basis

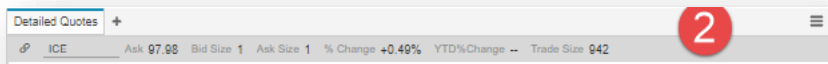
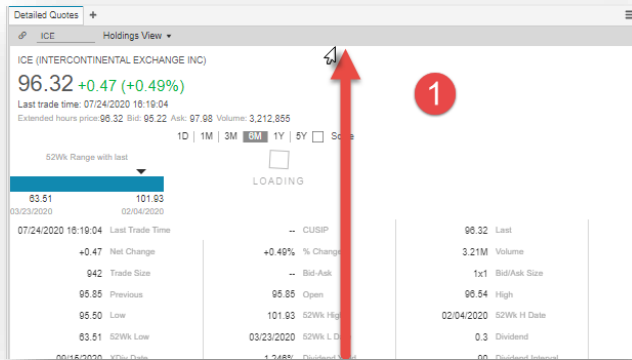
Display Preference: allows you to adjust display preferences that will apply to your current Detailed Quote widget

Detailed Quote Snap Quote View

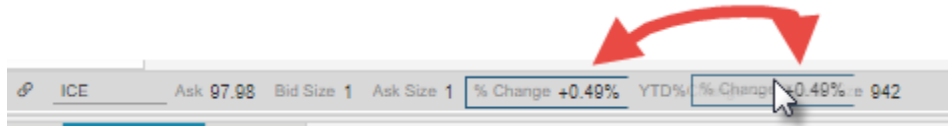
The Snap quote view allows you to get quick quotes with configurable fields in a single line.



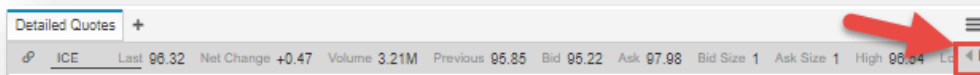
Dynamic Resizing: allows you to resize a standard view into the snap quote view by dragging the bottom of the widget to the tool bar to view the snap quote view



Drag and Drop Fields: Click, hold, and drag fields to rearrange them



Scroll Arrows: allow you to scroll left and right to view additional fields



Detailed Quote Snap Quote View Right click

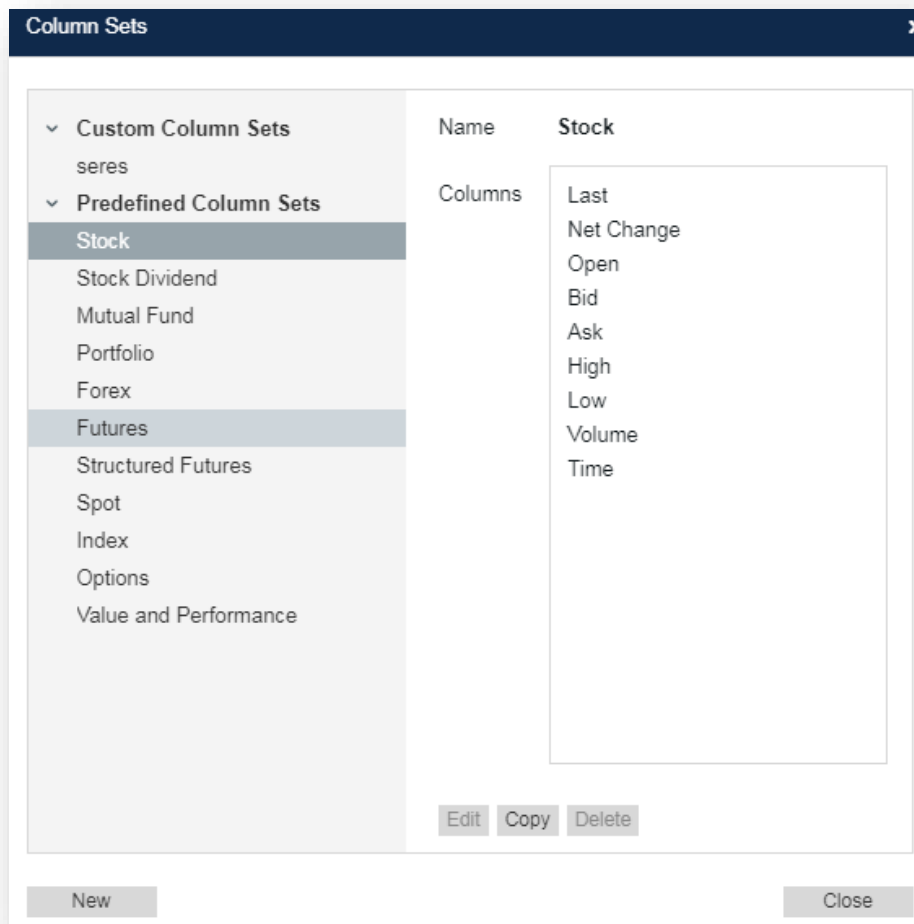


View: this allows you to view the selected symbol in another widget

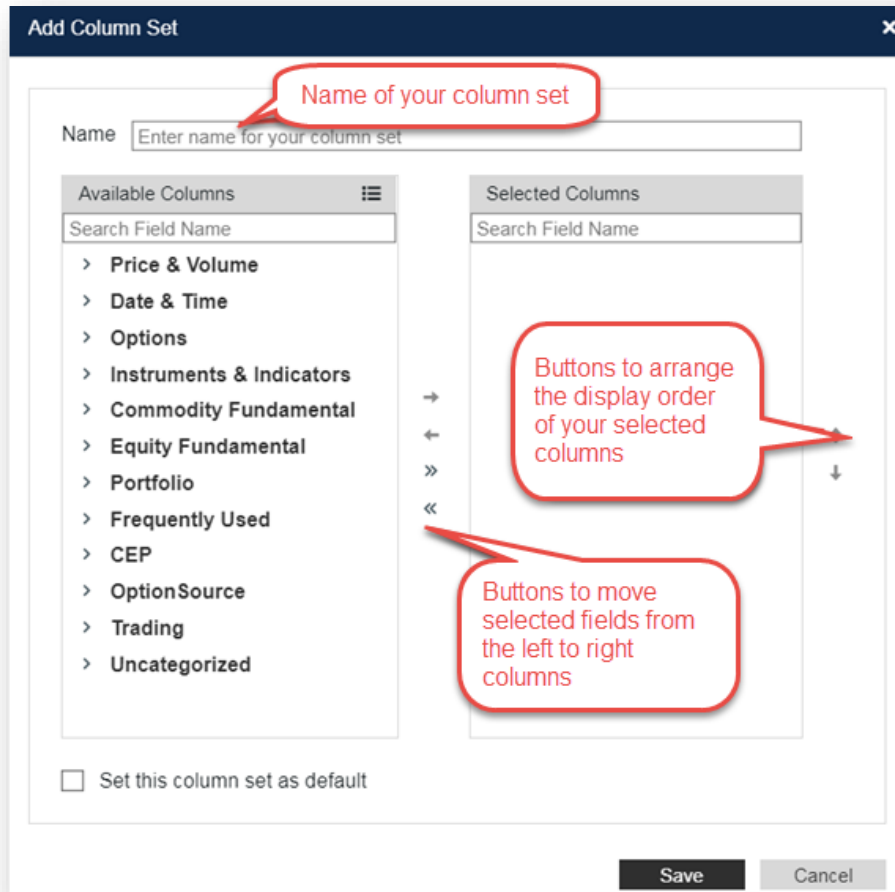
Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

Alerts: allows you to create an alert carrying the symbol clicked on

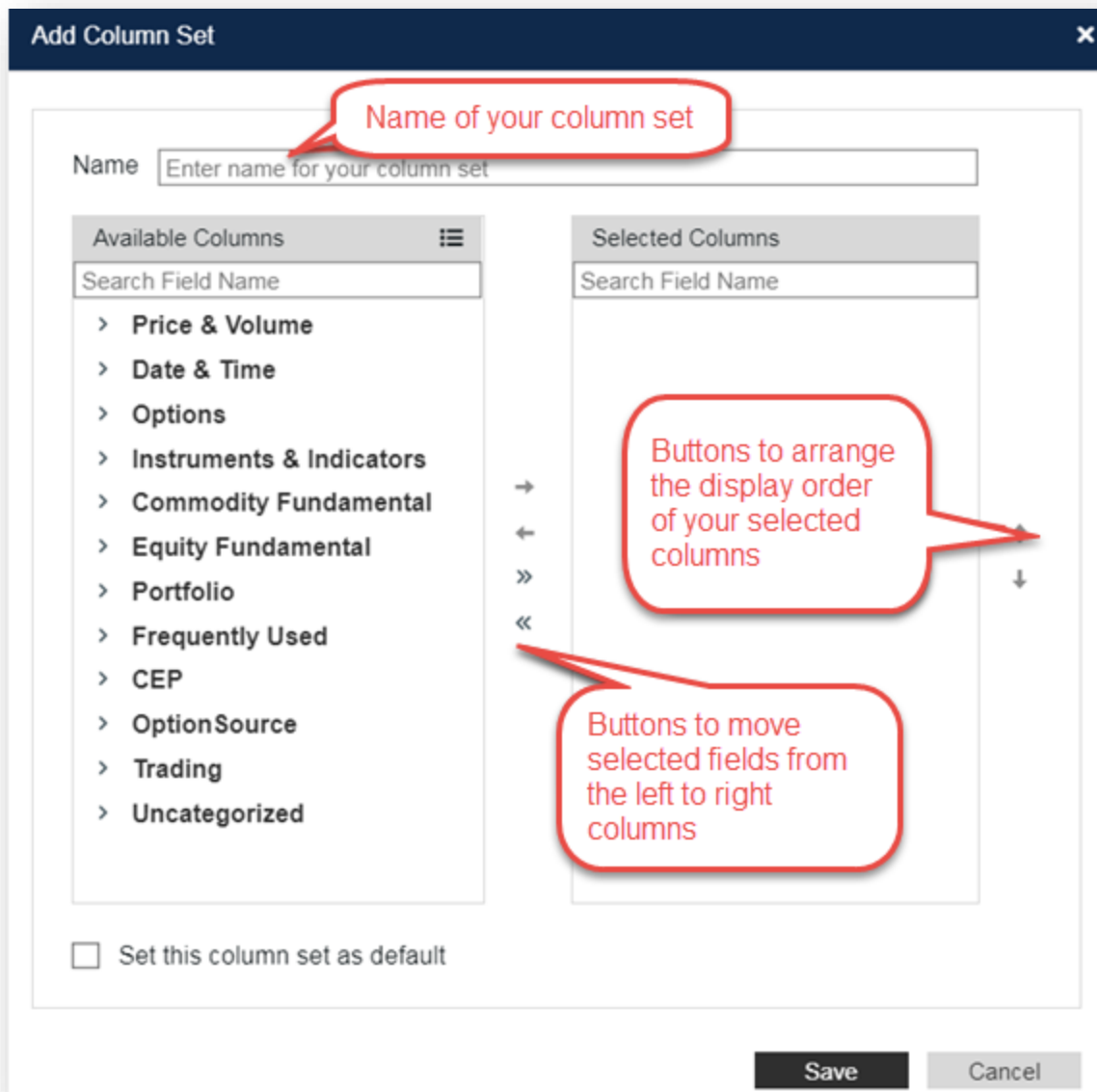
Fields: allows viewing and selecting predefined columns sets, clicking "customize" will open the fields menu that allows you to create new, save and manage column sets



New...: this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.



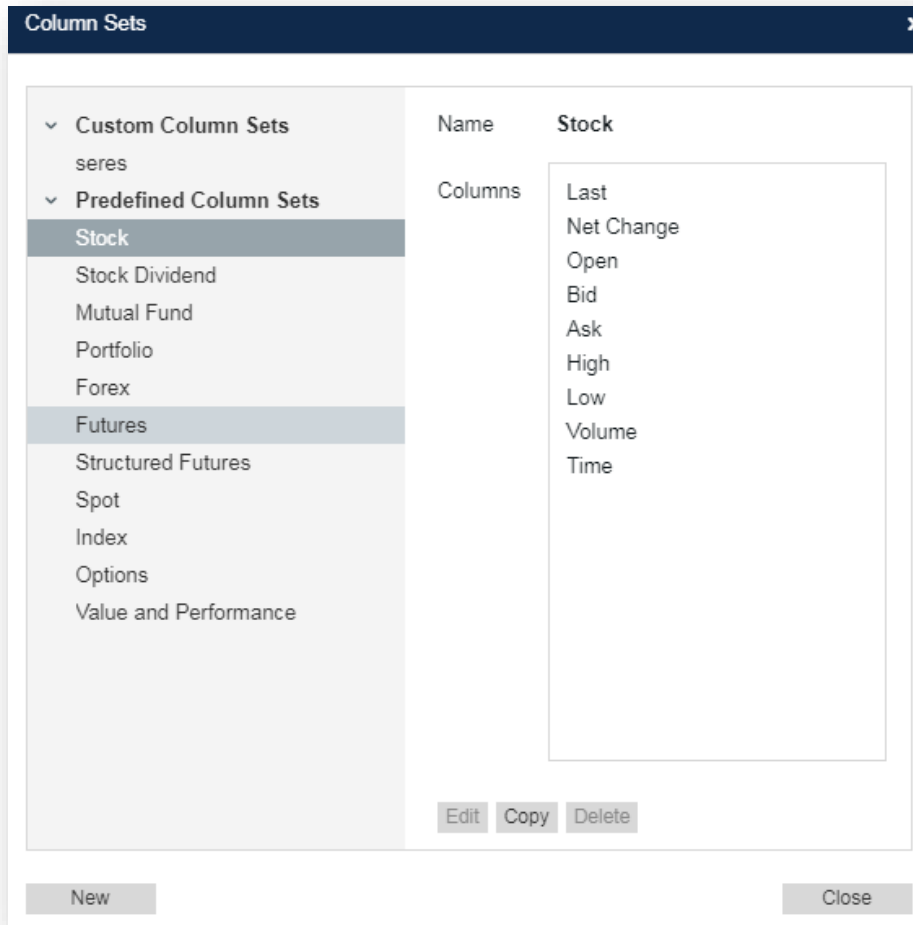
Save as...: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns



Managing Column Sets: allows you to update your Custom Column Set by:

- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.

- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side

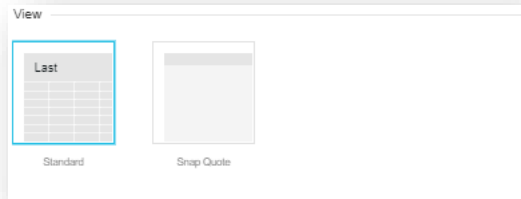


Display Preference: allows you to adjust display preferences that will apply to your current Detailed Quote widget

Detailed Quote Display Preferences

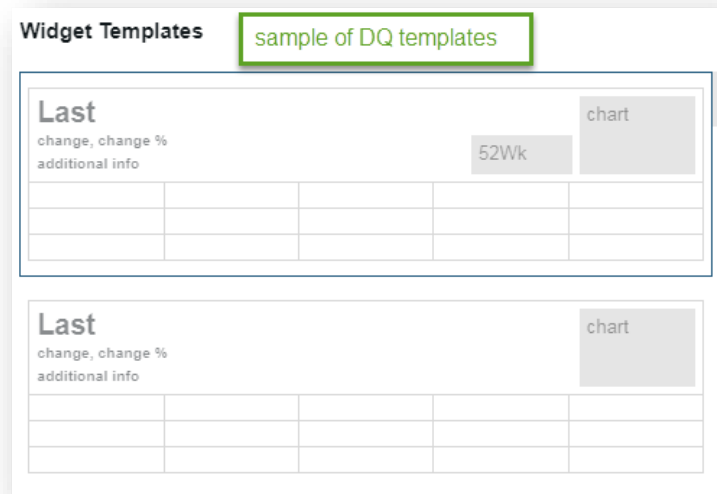
Accessed via right clicking anywhere on a Detailed Quote. Users can adjust to their preference for:

Views: allows you to switch views of the detailed quote widget from within an open widget



Widget Templates (only applies to standard view): this is a list of different template views with different placements for:

- Last/Change/Change %/ Additional Info
- 52 Week
- Chart
- Fields



Fields: this is a list of different cell template with different placements for:

- Value
- Label

Fields

Show Short Field Names

Cell templates

Value Label

Label Value

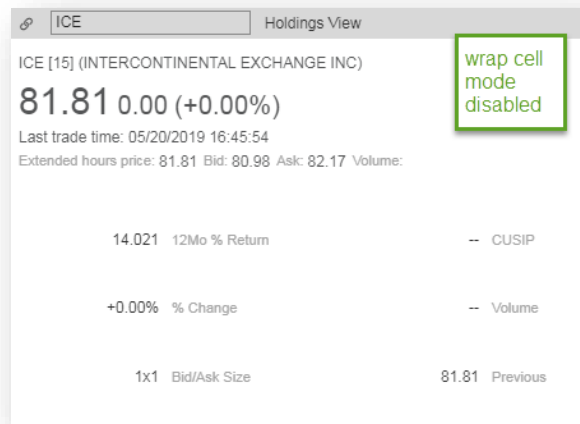
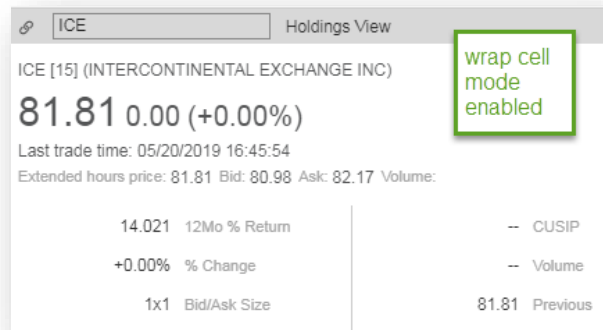
Label Value

Label Value

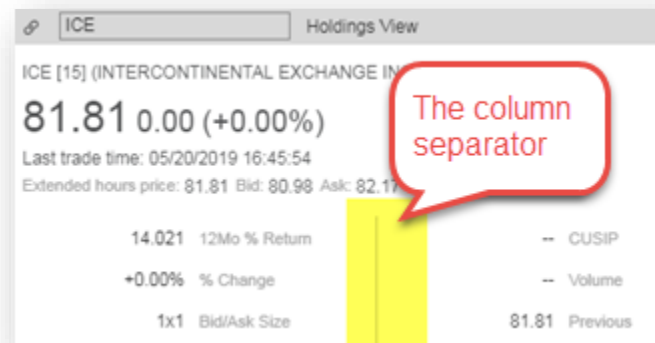
sample of DQ field placement

Formatting:

- **Wrapped cells mode:** allows you to change the amount of space between each cell

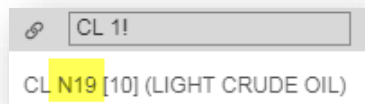


- **Show column separator:** a single line separating columns of cells

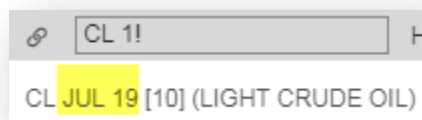


- **Show full precision on non-trade data:** non-trade data refers to non-pricing data like Volume

- **Show full precision on trade data:** trade data refers to pricing data like Last
- **Show month name (in commodities):** changes the Month name from the ICE symbology to the Calendar month name



CL 1!
CL N19 [10] (LIGHT CRUDE OIL)



CL 1!
CL JUL 19 [10] (LIGHT CRUDE OIL)

Options

The Options widget allows you to see in-depth information on option contracts. The strategy, expiration, strike, and columns are configurable in order to display all the information you need in the table.

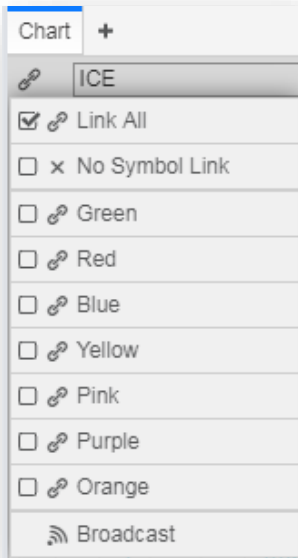
Options +												
ICE		Select strategy	Next 1 Expiration		Select strikes		Default					
Symbol: ICE	Net Change: +1.96	Previous: 91.74	Ask: 93.76	Ask Size: 2	Low: 92.61	Trade Size: 116	52Wk Low: 83.51	ExtHours:	% Change: +2.14%	PE:		
Last: 93.70	Volume: 983,944	Bid: 93.70	Bid Size: 2	High: 94.68	Open: 92.99	52Wk High: 101.93	Open Interest:	Trade Exchange: THRD	EPS: 3.7696	Mark:		
Symbol: O:ICE 20E37.50D15		Net Change:	Previous:	Ask:	Ask Size:	Low:	Trade Size:	Date:	Bid Exchange:	% Change:	Days Till Expiration:	
Last:		Volume:	Bid:	Bid Size:	High:	Open:	Open Interest:	Time:	Ask Exchange:	BETA:		
Calls						Puts						
Symbol	Bid	Ask	Last	Net Chan	Open Inte	Strike	Symbol	Bid	Ask	Last	Net Chan	Open Inte
▼ 15-May-20												
O:ICE 20E35.00D15						35.00	O:ICE 20Q35.00D15					
O:ICE 20E37.50D15						37.50	O:ICE 20Q37.50D15					
O:ICE 20E40.00D15						40.00	O:ICE 20Q40.00D15					
O:ICE 20E42.50D15						42.50	O:ICE 20Q42.50D15					
O:ICE 20E45.00D15						45.00	O:ICE 20Q45.00D15					
O:ICE 20E47.50D15						47.50	O:ICE 20Q47.50D15					
O:ICE 20E50.00D15						50.00	O:ICE 20Q50.00D15					
O:ICE 20E55.00D15						55.00	O:ICE 20Q55.00D15					
O:ICE 20E60.00D15						60.00	O:ICE 20Q60.00D15					
O:ICE 20E65.00D15						65.00	O:ICE 20Q65.00D15					
O:ICE 20E67.50D15						67.50	O:ICE 20Q67.50D15					
O:ICE 20E70.00D15						70.00	O:ICE 20Q70.00D15					
O:ICE 20E72.50D15						72.50	O:ICE 20Q72.50D15					
O:ICE 20E75.00D15						75.00	O:ICE 20Q75.00D15					
O:ICE 20E77.50D15						77.50	O:ICE 20Q77.50D15					
O:ICE 20E80.00D15						80.00	O:ICE 20Q80.00D15					
O:ICE 20E82.50D15						82.50	O:ICE 20Q82.50D15					
O:ICE 20E85.00D15						85.00	O:ICE 20Q85.00D15					

Options Title Bar



Linking:

Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

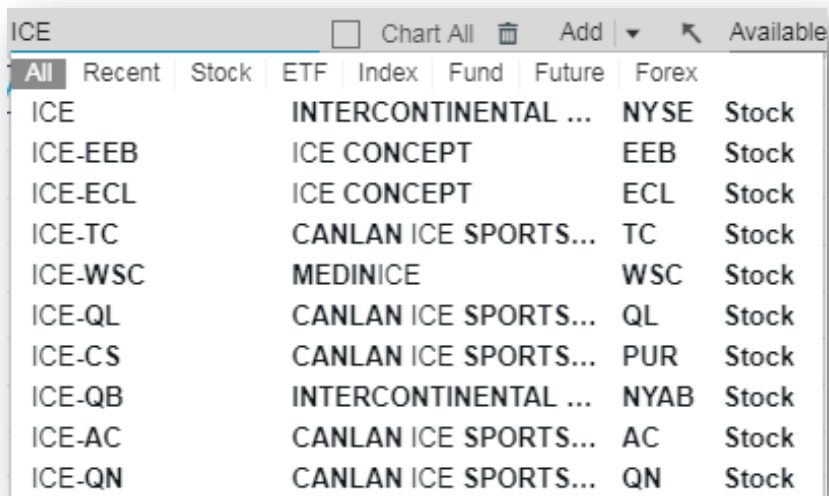
Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Options to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Symbol Search Box: this is our symbol entry and symbol search entry point.

Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund
- Future
- Forex



The screenshot shows a search results window titled 'ICE'. At the top, there are tabs for 'All', 'Recent', 'Stock', 'ETF', 'Index', 'Fund', 'Future', and 'Forex'. Below the tabs is a table of search results. The table has columns for the symbol, the instrument name, the exchange, and the instrument type. The results are as follows:

Symbol	Instrument Name	Exchange	Instrument Type
ICE	INTERCONTINENTAL ...	NYSE	Stock
ICE-EEB	ICE CONCEPT	EEB	Stock
ICE-ECL	ICE CONCEPT	ECL	Stock
ICE-TC	CANLAN ICE SPORTS...	TC	Stock
ICE-WSC	MEDINICE	WSC	Stock
ICE-QL	CANLAN ICE SPORTS...	QL	Stock
ICE-CS	CANLAN ICE SPORTS...	PUR	Stock
ICE-QB	INTERCONTINENTAL ...	NYAB	Stock
ICE-AC	CANLAN ICE SPORTS...	AC	Stock
ICE-QN	CANLAN ICE SPORTS...	QN	Stock

Strategy selector: option to show:

- Calls only
- Puts only

Expiration selector: option to view:

- **Next:** Displays a selection of the quantity of option chains starting with the current month's expiration to display, starting from the closest month's expiration and building outwards. Next 1 displays only the current month's expiration chain. Next 2 would display the next 2 expiration chains and so forth.

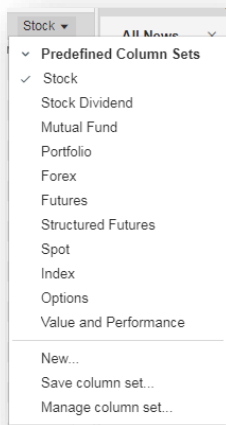
- **Weekly:** Displays all the chains that are classified as weekly expirations. Choose all weekly chains or check off specific expirations to view.
- **Monthly:** Displays all the monthly chains that are classified as monthly expirations. Choose all monthly chains or check off specific expirations to view.
- **Of a specific date:** Combines the weekly and monthly expiration list so the user can have a single view of all expirations and check off specific expirations to view.

Strike Filter: allows you to filter by strike types:

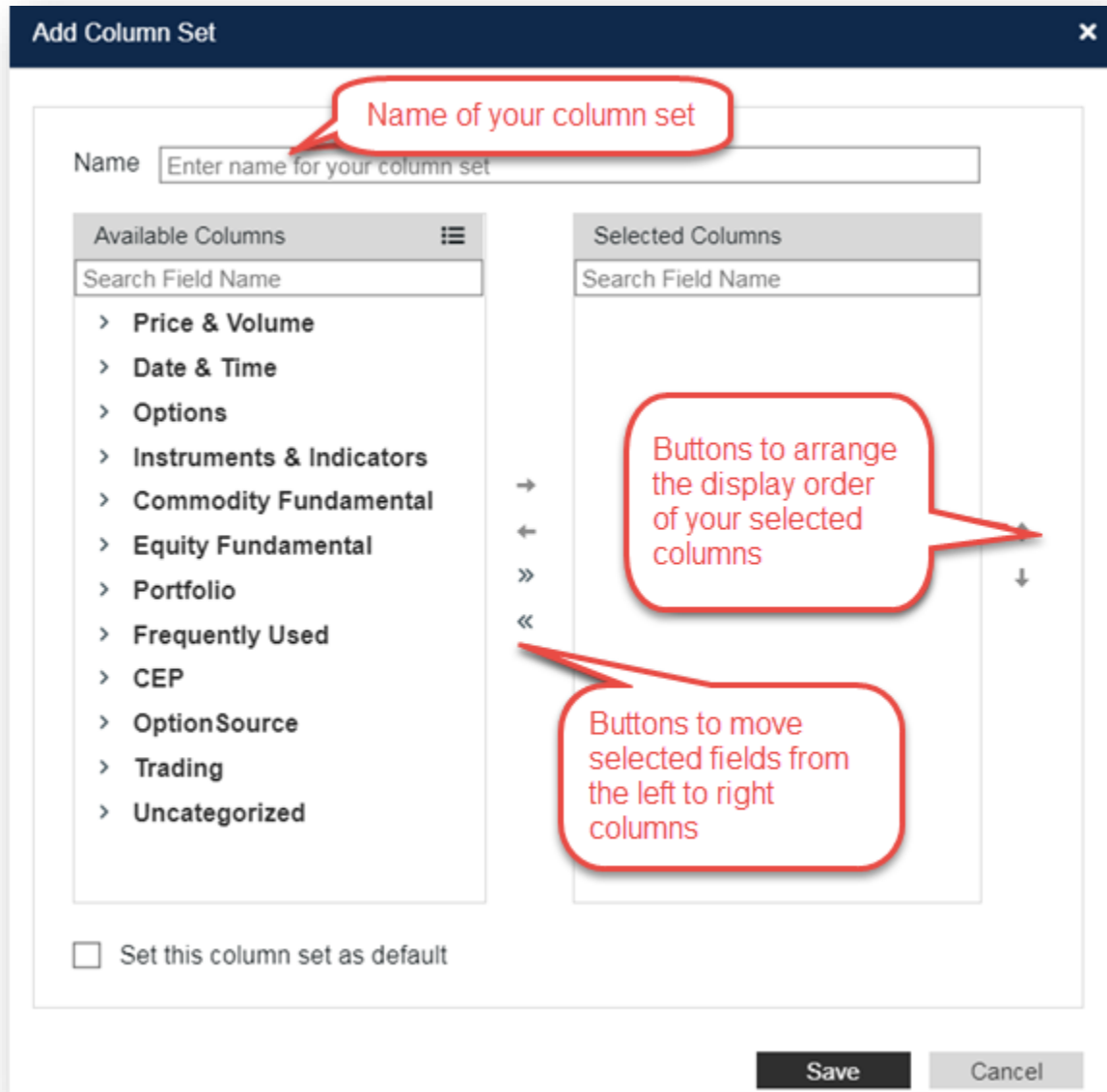
- **All Strikes:** default option
- **In the money:** A call option is in the money when the strike price is below the spot price. A put option is in the money when the strike price is above the spot price.
- **Near the money:** a user definable number of out of the money options that are closest to being at the money.
- **Out the money:** A call option is out of the money when the strike price is above the spot price. A put option is out of the money when the strike price is below the spot price.
- **Strikes:** filtering by specific strike price

Column Fields: allows viewing and selecting predefined columns sets.

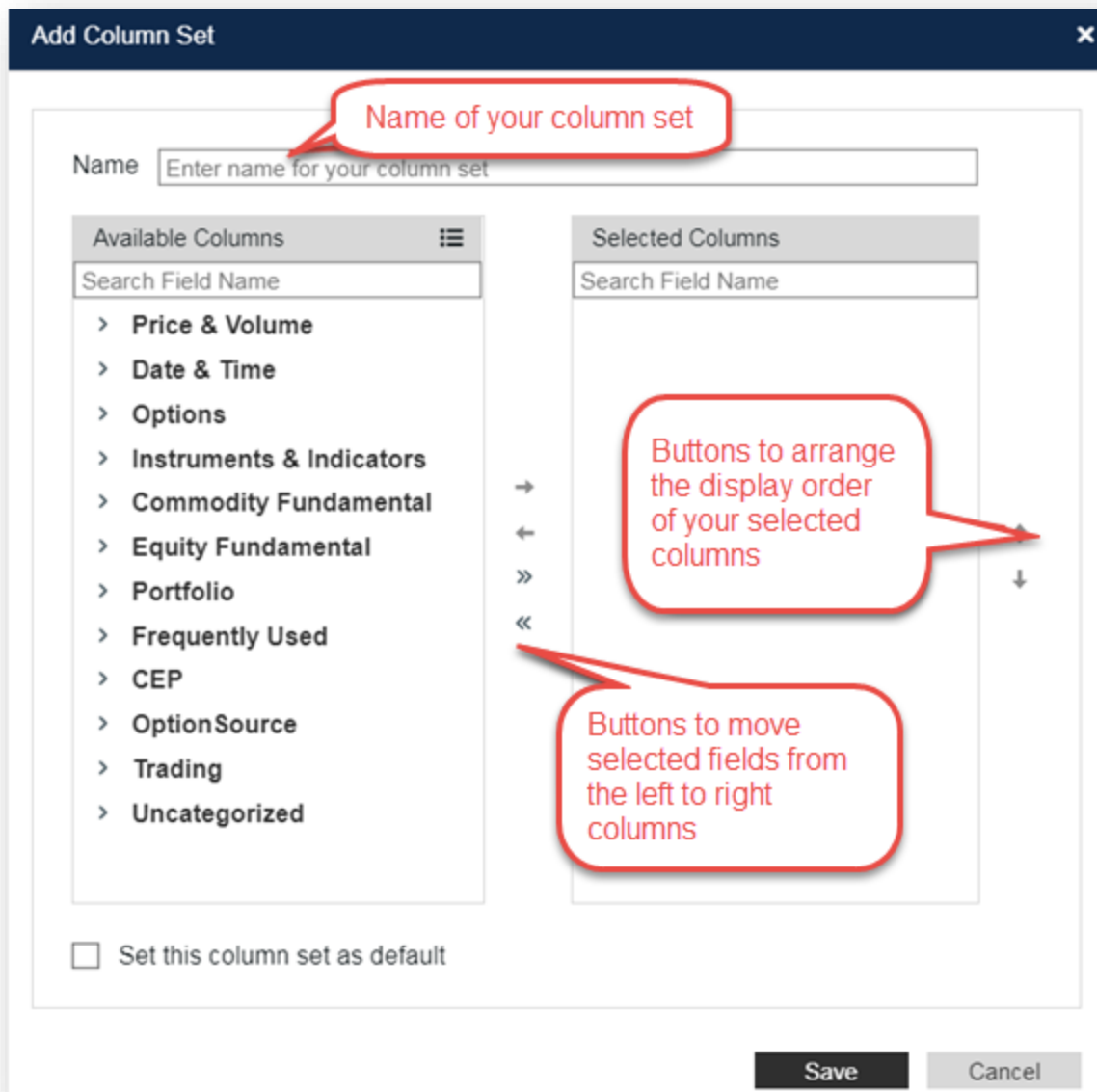
There is a section on the bottom to create new, save and manage column sets



New...: this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.



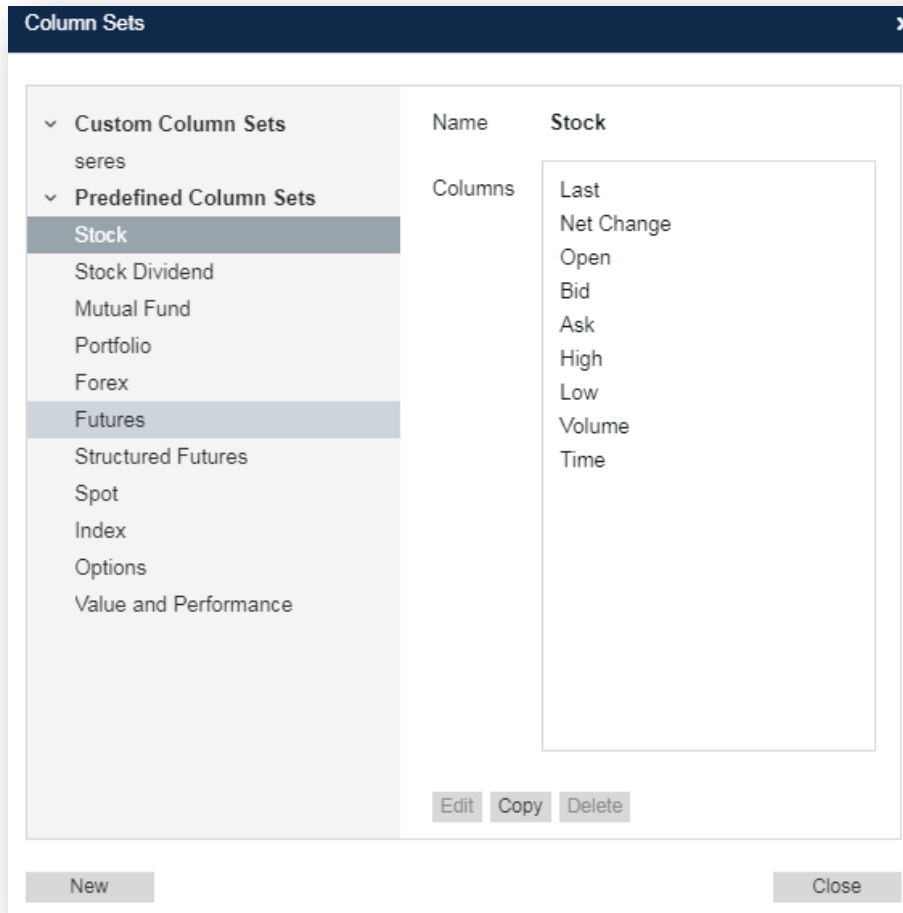
Save as...: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns

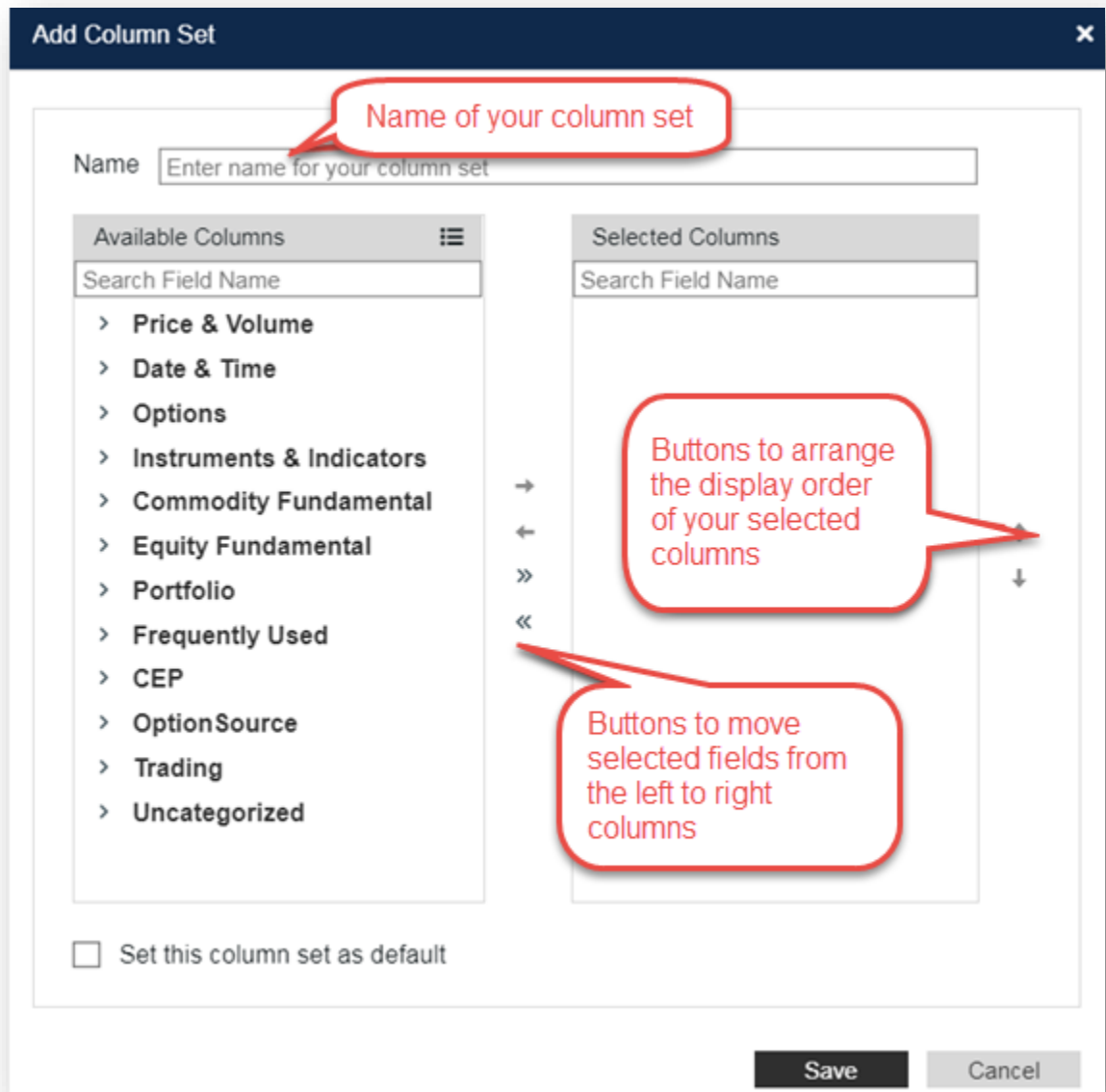


Managing Column Sets: allows you to update your Custom Column Set by:

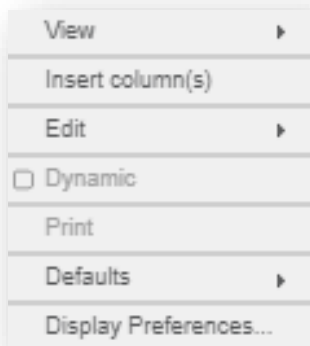
- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.

- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side





Options Right Click



View: this allows you to view the selected symbol in another widget

Insert Columns: allows you to insert columns to your Options widget

Delete Selected Columns: allows you to delete the selected column

Edit: allows you to do the following

- Copy as text
- Select all
- Best fit (the column you clicked in)
- Best fit all columns

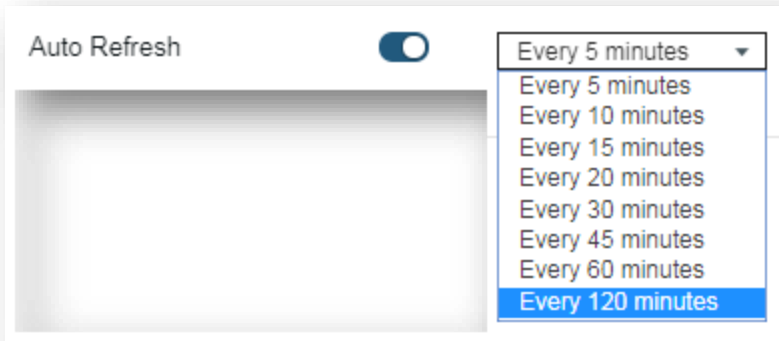
Defaults: allows you to save and apply properties you've changed for your current Options widget to other Options widget on a case by case basis

Display Preference: allows you to adjust display preferences that will apply to your current Options widget

Options Display Preferences

Instrument Preferences: display data for Equities or Futures

Auto Refresh: option to select an auto refresh interval



Option to display additional information panes:

- Security Details
- Options Details
- Put/Call Headings
- Expiration Headings
- Symbol Column

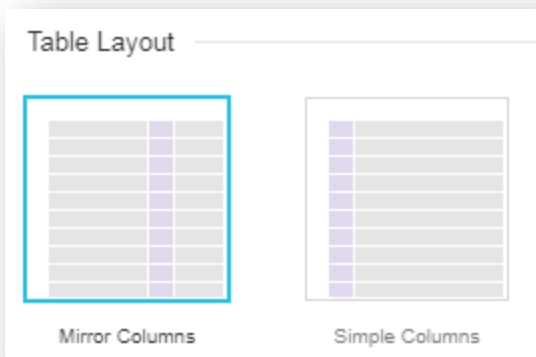
The screenshot shows an options trading interface with several callouts:

- Security Details Pane:** Points to the top summary row for the selected symbol (ICE [15]).
- Options Details Pane:** Points to the second summary row for the selected option (O:ICE 19F60.00D21 [15]).
- Symbol Column:** Points to the 'Symbol' column in the main table.
- Expiration Header:** Points to the '21-Jun-19' header for the selected expiration date.

Calls													Puts			
Symbol	Bid	Ask	Last	Net	Open	Strike	Symbol	Bid	Ask	Last	Net ...	Ope...				
▼ 21-Jun-19																
O:ICE 19F47.50C	36.10	38.70				50	O:ICE 19R47.50C		0.65							
O:ICE 19F50.00C	33.00	37.30	27.50			50.00	O:ICE 19R50.00C		0.65	0.05		49				
O:ICE 19F55.00C	28.00	32.30				55.00	O:ICE 19R55.00C		0.65	0.05	-0.38	26				
O:ICE 19F60.00C	23.00	27.30				60.00	O:ICE 19R60.00C		0.15	0.05	-0.06	256				
O:ICE 19F62.50C	20.50	24.80				62.50	O:ICE 19R62.50C		0.65	0.32	-0.01	47				
O:ICE 19F65.00C	19.10	21.30	20.37			65.00	O:ICE 19R65.00C		0.65	0.12	-0.02	280				
O:ICE 19F67.50C	15.50	19.80	17.70	-1.18		67.50	O:ICE 19R67.50C		0.05	0.05		181				

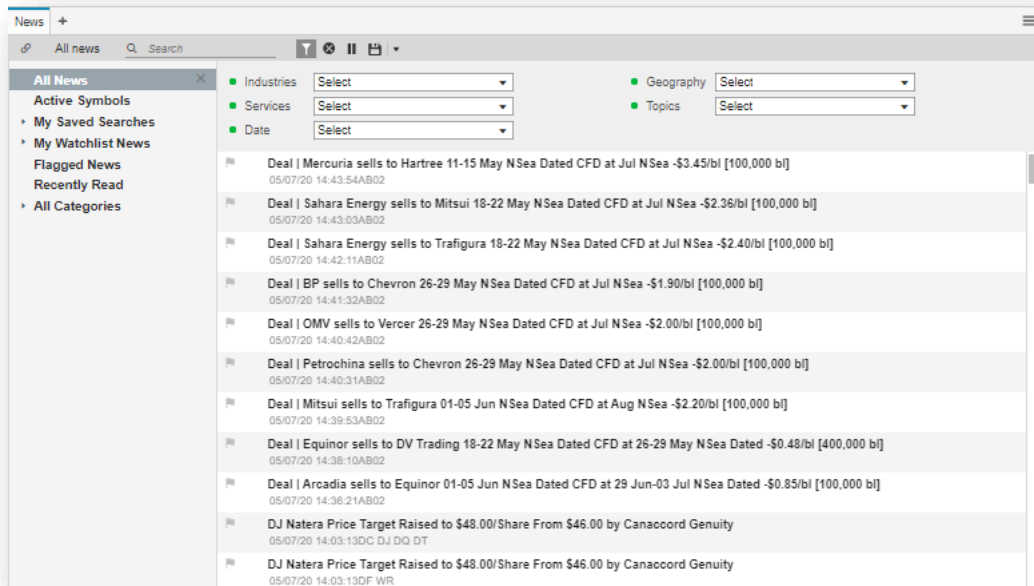
Table Layout: option to choose between mirror columns or a simple columns view

- **Mirror Columns:** Traditional option chain view with calls on the left side, puts on the right, with strike price in the center. In this view each line represents a different strike price, which are displayed in numerical order.
- **Simple View:** Alternative option chain view where calls and puts are combined into a single column in numerical order by strike price. For each strike price, the call is displayed followed by the put.

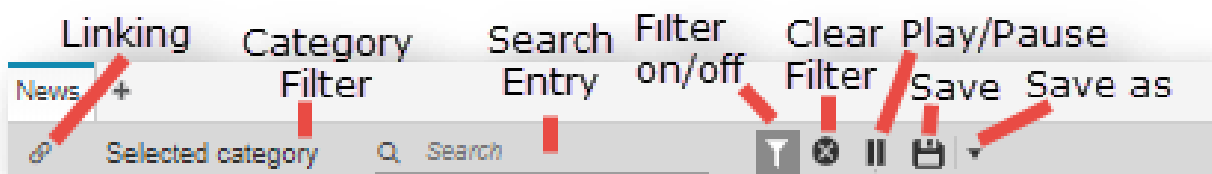


News

The News widget allows you to quickly view real time streaming news, with the ability to filter by symbols, watchlists, industries, services, date, geography, or topics. This allows you to narrow down results in real time or historical news to find exactly what you are looking for.

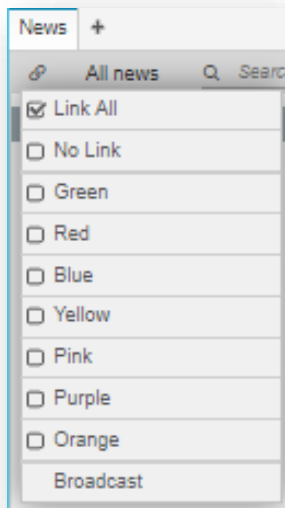


News Title Bar



Linking:

Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green News to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Category Filter: allows to filter news by selecting a category such as: Saved Searches, Watchlists, Flagged News, and Predefined Categories

Search Entry: allows you to search news for a specific symbol, multiple symbols, or a category

Filter Button: allows you to display or hide the filter pane

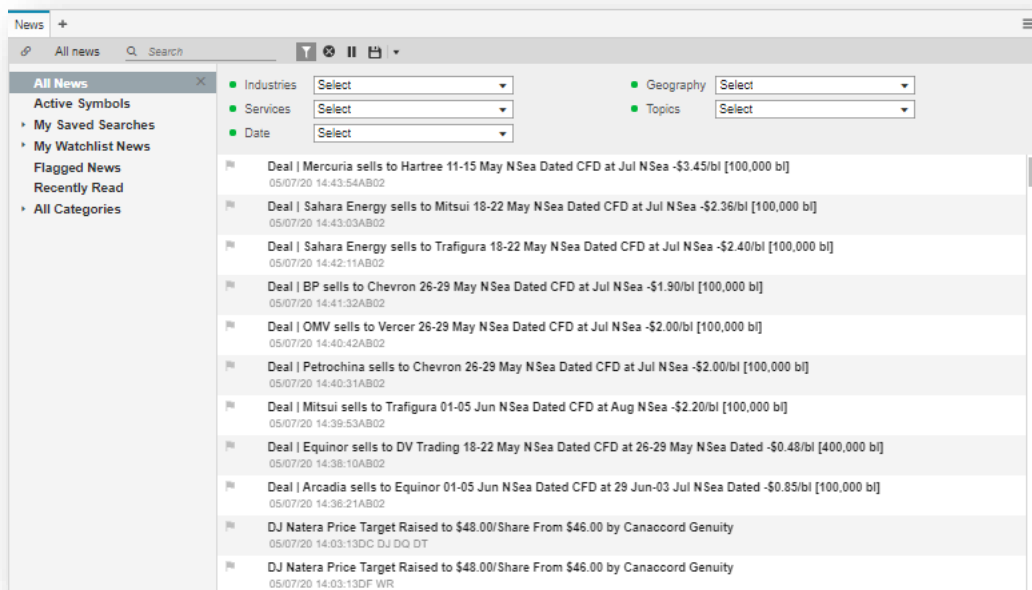
Clear Filter: clears all filters

Play/Pause: allows you to pause and play the scrolling news

Save: saves the filter

Save As: saves the filter as a new saved filter

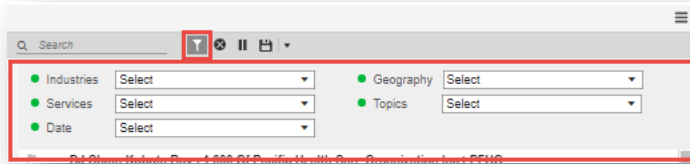
News Main View



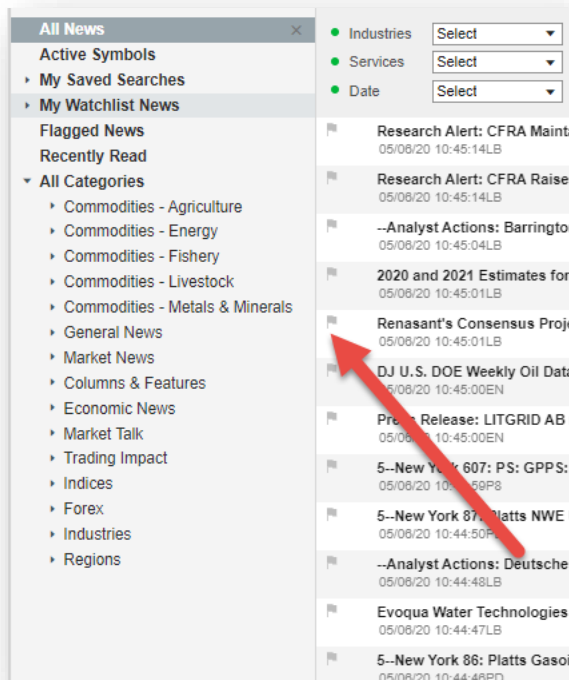
Filter Pane: pane at the top of the main view with dropdown menus to select, multiselect, or unselect from the following categories:

- Industries
- Services

- Date
- Geography
- Topics



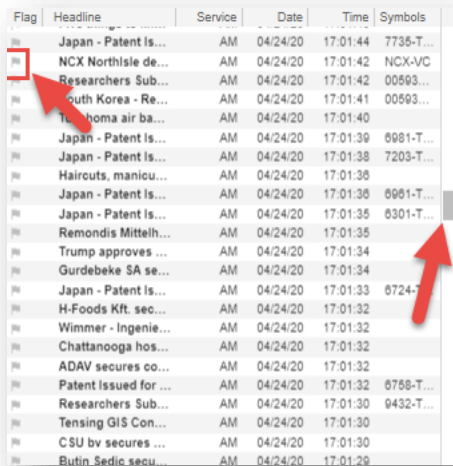
Category Tree: Allows you to quickly search news for all news, active symbols, your saved searches, watchlists, flagged news, recently read, or by categories. This pane can be closed by clicking the “x” icon in the top right of the pane, and to reopen it by selecting “show categories tree” in the category selector in the title bar.



Filter pane: at the top of the main view with dropdown menus to select, multiselect, or unselect from the following categories

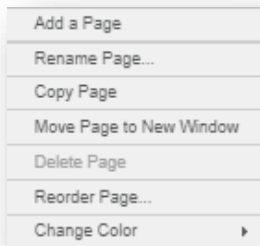
Grid View: allows you to see all the scrolling news, and click on a row to open that story, or the flag to flag a story

Scroll Bar: allows you to scroll backwards or forwards to news results

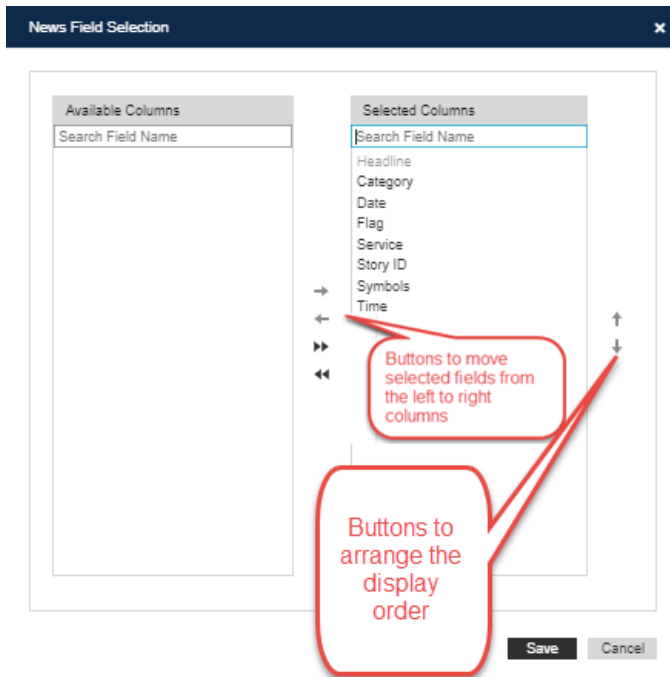


Flag	Headline	Service	Date	Time	Symbols
🚩	Japan - Patent Is...	AM	04/24/20	17:01:44	7735-T...
🚩	NCX Northisle de...	AM	04/24/20	17:01:42	NCX-VC
🚩	Researchers Sub...	AM	04/24/20	17:01:42	00593...
🚩	South Korea - Re...	AM	04/24/20	17:01:41	00593...
🚩	Tennessee air ba...	AM	04/24/20	17:01:40	
🚩	Japan - Patent Is...	AM	04/24/20	17:01:39	6981-T...
🚩	Japan - Patent Is...	AM	04/24/20	17:01:38	7203-T...
🚩	Haircuts, manicu...	AM	04/24/20	17:01:38	
🚩	Japan - Patent Is...	AM	04/24/20	17:01:36	6961-T...
🚩	Japan - Patent Is...	AM	04/24/20	17:01:35	6301-T...
🚩	Remondis Mittelh...	AM	04/24/20	17:01:35	
🚩	Trump approves ...	AM	04/24/20	17:01:34	
🚩	Gurdebeke SA se...	AM	04/24/20	17:01:34	
🚩	Japan - Patent Is...	AM	04/24/20	17:01:33	6724...
🚩	H-Foods Kft. sec...	AM	04/24/20	17:01:32	
🚩	Wimmer - Ingenie...	AM	04/24/20	17:01:32	
🚩	Chattanooga hos...	AM	04/24/20	17:01:32	
🚩	ADAV secures co...	AM	04/24/20	17:01:32	
🚩	Patent issued for ...	AM	04/24/20	17:01:32	6758-T...
🚩	Researchers Sub...	AM	04/24/20	17:01:30	9432-T...
🚩	Tensing GIS Con...	AM	04/24/20	17:01:30	
🚩	CSU bv secures ...	AM	04/24/20	17:01:30	
🚩	Butin Sedic secu...	AM	04/24/20	17:01:29	

News Right Click



Fields: allows you select which fields to be displayed



Sort Ascending by:

- Headline
- Service
- Date
- Time
- Symbols

Sort Descending by:

- Headline
- Service
- Date
- Time
- Symbols

Defaults: allows you to save and apply properties you've changed for your current News widget to other News widget on a case by case basis

Display Preferences: allows you to adjust display preferences that will apply to your current News widget

News Display Preferences

News List: allows you to change how scrolling news stories are displayed

- **Compact View:** displays the data points for all the selected fields in a compact container for each story with no column headings
- **Grid View:** displays the selected fields as column headings and each corresponding data point scrolls with each story in its own row
- **Wrap Headline:** wraps news headline inline

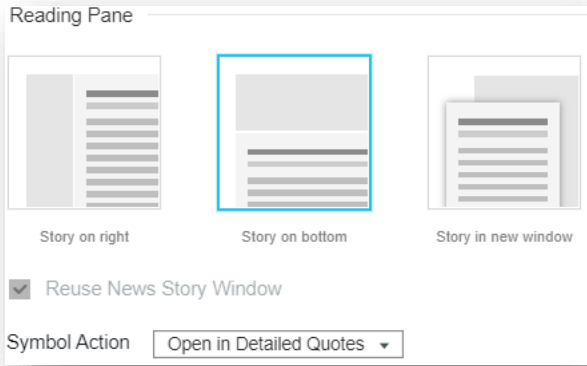


Reading Pane: allows you to change the location of where your opened news opens for reading

- **Story on right:** when clicking on a news headline, the story will open in the reading pane to the right
- **Story on bottom:** when clicking on a news headline, the story will open in the reading pane on the bottom
- **Story in new window:** when clicking on a news headline, the story will open in a new window
- **Reuse News Story Window:** displays stories you click on in the same window, and is only available when selecting "story in new window"

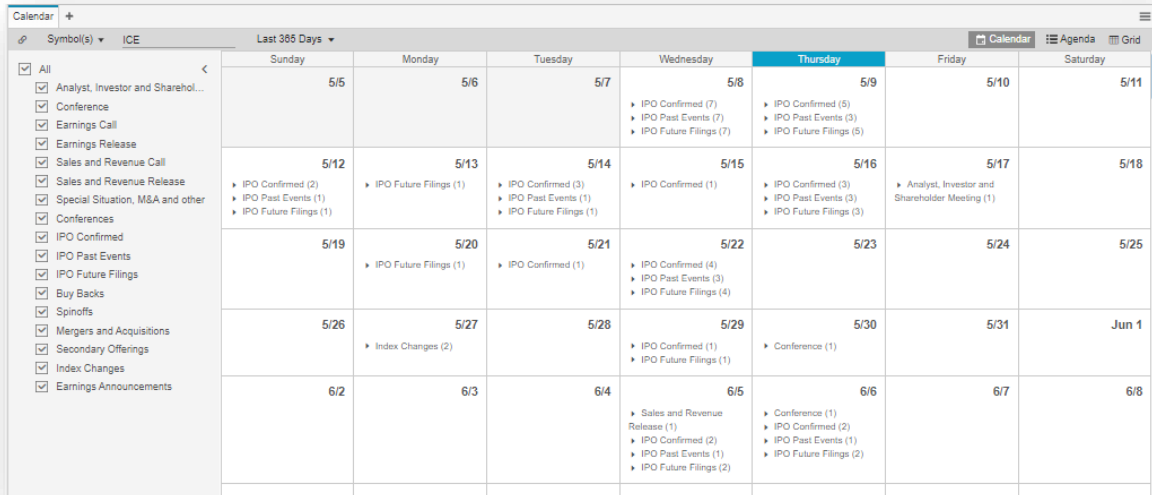
Symbol Action: allows you to view symbol in:

- In Linked Windows
- In Detailed Quote
- In Chart
- In Fundamentals

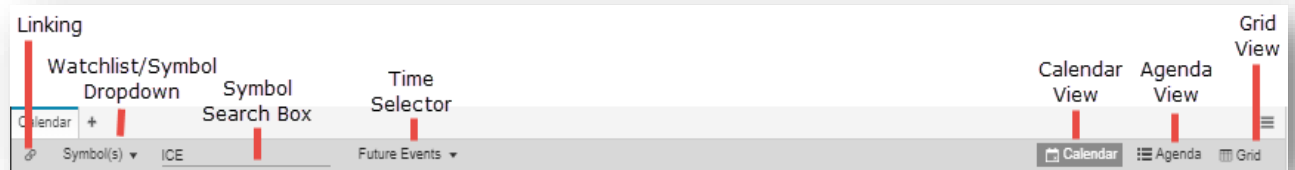


Calendar

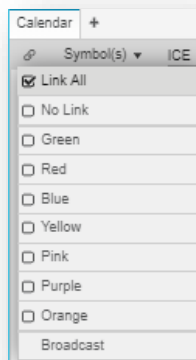
The Calendar widget allows you to view future and historical equity events for your symbols. Filters allow you to narrow down results to find the events you are looking for. Opening events on the calendar will provide more information on the event with supplemental material that you can open for the event.



Calendar Title Bar



Linking: Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Calendar to Green Chart

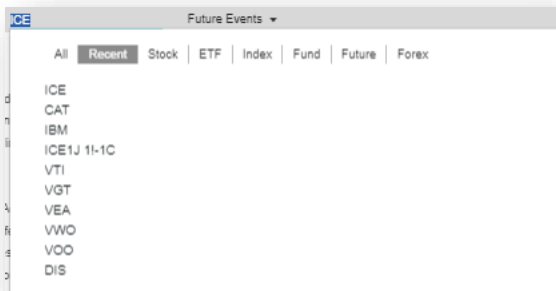
Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Watch List / Symbol Selection Menu: allows you to enter individual symbols, view active symbols, watchlists, or market indices.

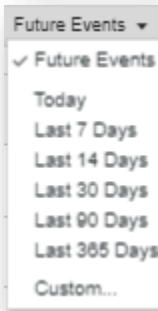
Symbol Search Box: this is our symbol entry and symbol search entry point.

Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

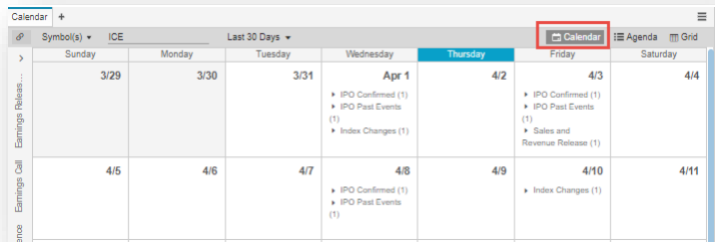
- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund
- Future
- Forex



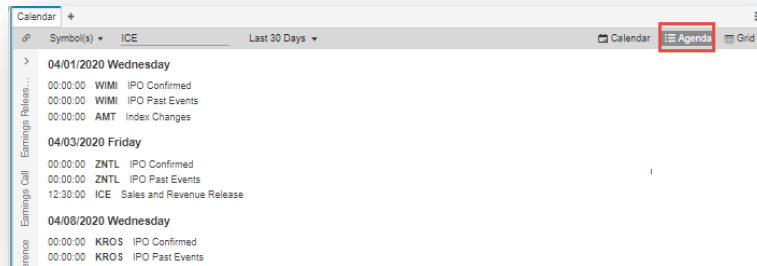
Time Selector: allows you to select a future or historical time period to view events, including the ability to filter custom time periods



Calendar View: allows you to enable the calendar view that displays each day as its own box with all the events for that day displaying in the box



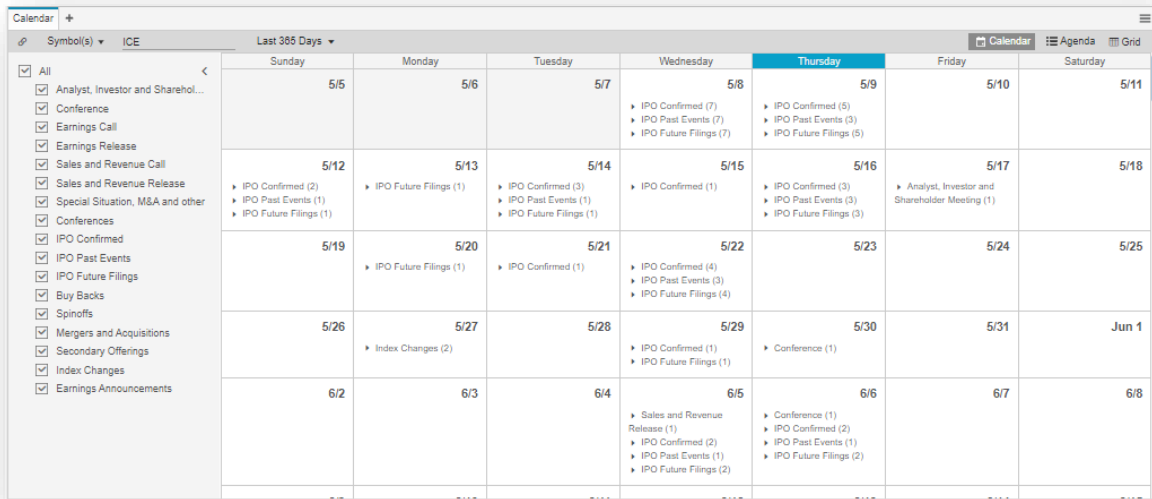
Agenda View: allows you to enable the agenda view that displays each day vertically in bold and all the events for that day listed below



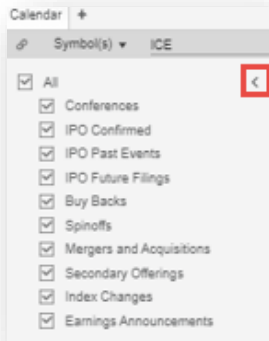
Grid View: allows you to enable the grid view that displays each event in its own row with columns for each data point in the grid



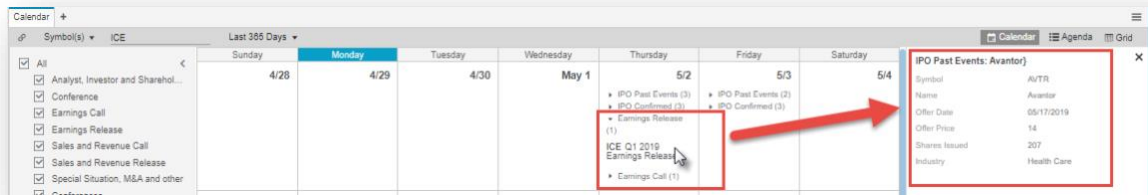
Calendar Main View



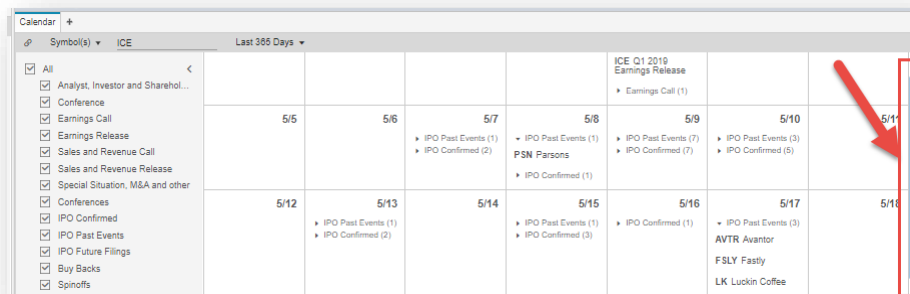
Events Filter Pane: allows you to filter for all or select events, you can collapse or open the event filter pane using the carrot in the top right



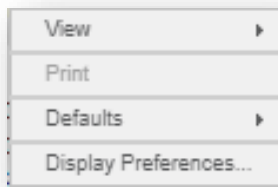
Events: events that appear in any of the views can be clicked on to expand in the events details pane



Scroll Bar: Allows you to scroll backwards or forwards to news results



Calendar Right Click



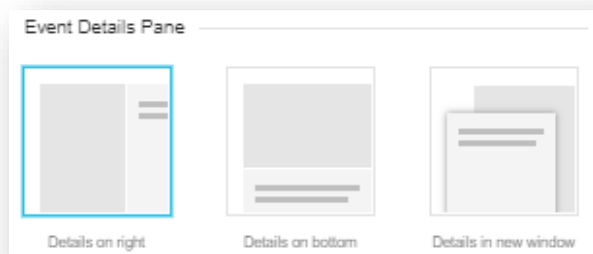
View: allows you to view the selected symbol in another widget

Defaults: allows you to save and apply properties you've changed for your current Calendar widget to other Calendar widget on a case by case basis

Display Preference: allows you to adjust display preferences that will apply to your current Calendar widget

Calendar Display Preferences

Events Details Pane: Allows you to change the location of where the expanded event details open



Details on right: when clicking on an event, the additional event details will open in the event details pane to the right

Details on bottom: when clicking on an event, the additional event details will open in the event details pane on the bottom

Details in new window: when clicking on an event, the additional event details will open in the event details pane in a new window

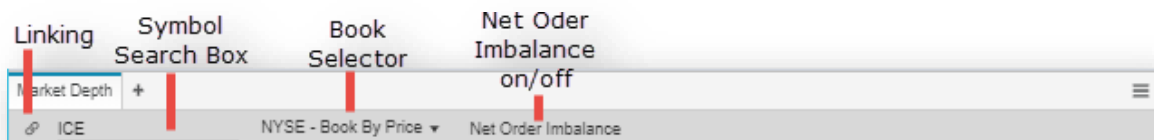
Calendar Show weekends: allows you to enable or disable weekends from appearing

Market Depth

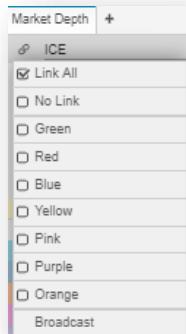
Shows the buy/sell activity of market participants trading on the U.S. exchanges, for a specified symbol. This window displays quotes only. The window is divided into two parts. The left-side is the buy-side and the right side is the sell-side and there are several views of the data

MMID	Bid	Size	Time	MMID	Ask	Size	Time
NYSE	93.78	1	14:08:00	NYSE	93.82	1	14:07:40
NYSE	93.77	1	14:07:37	NYSE	93.88	1	14:08:01
NYSE	93.75	1	14:07:27	NYSE	93.92	1	14:07:28
NYSE	93.73	2	14:07:28	NYSE	93.95	1	14:05:40
NYSE	93.72	5	14:07:41	NYSE	93.99	5	14:07:28
NYSE	93.71	1	14:07:00	NYSE	94.00	1	14:05:54
NYSE	93.67	5	14:07:28	NYSE	94.05	1	14:07:28
NYSE	93.60	2	14:02:48	NYSE	94.11	1	14:05:35
NYSE	93.58	1	14:05:35	NYSE	94.17	1	14:05:54
NYSE	93.49	1	14:04:02	NYSE	94.24	1	14:05:55
NYSE	93.43	1	13:59:28	NYSE	94.99	1	10:43:02
NYSE	93.37	1	13:38:58	NYSE	95.00	3	11:50:20
NYSE	93.36	1	14:01:05	NYSE	95.40	1	09:55:03
NYSE	93.20	1	11:40:10	NYSE	95.50	5	11:47:40
NYSE	92.89	1	10:27:03	NYSE	95.51	1	10:44:24
NYSE	92.88	1	10:24:12	NYSE	96.00	11	12:19:45
NYSE	92.50	1	09:30:04	NYSE	96.25	1	11:48:47
NYSE	92.10	1	09:54:58	NYSE	96.45	1	09:38:01
NYSE	92.00	1	09:38:54	NYSE	96.50	1	09:38:54
NYSE	91.87	1	12:30:11	NYSE	96.75	10	12:20:13
NYSE	91.74	1	09:49:23	NYSE	96.95	1	07:20:41

Market Depth Title Bar



Linking: Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

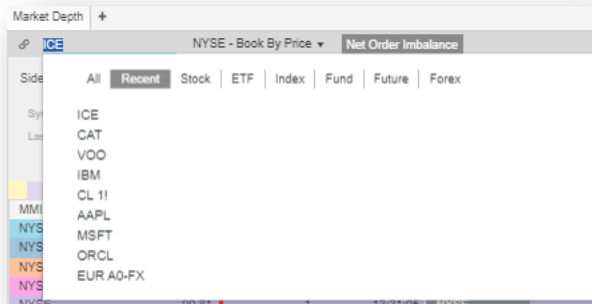
Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Market Depth to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

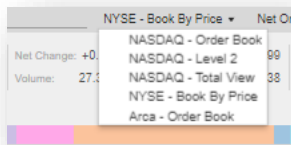
Symbol Search Box: this is our symbol entry and symbol search entry point.

Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund
- Future
- Forex



Book Selector: allows you to switch between the available order books



Net Order Imbalance: allows you to display the net order imbalance which includes the following fields

- **Imbalance Side (Side):** The Imbalance Side field indicates the market side for of the imbalance
 - **Bid:** buy-side imbalance
 - **Sell:** sell-side imbalance
 - **No Imb:** no imbalance (buy side equals sell side)
 - **O:** no marketable on-open (or on-close) orders in NASDAQ, thus no imbalance
- **Current Inside Match Price (CIMP):** The Current Inside Match Price reflects the price for which the number of Paired Shares and the number of Imbalance Shares are calculated. Please note that the Current Inside Match Price is determined by the price within the NASDAQ Inside where the maximum number of shares are paired, the imbalance is minimized and the distance from the bid-ask midpoint is minimized, in that order. If this field is null or blank, it is because there is no Current Inside Match Price for the specific security.
- **Far Indicative Clearing Price (FICP):** This field indicates the price level at which buy orders and sell orders match in the opening/ closing book. If this field is null or blank, this indicates one of two circumstances:
 - There are no on-open (or on-close) orders entered for the security; or

- There is no substantial on-open (or on-close) interest on the opposite side of the market to execute all of the MOO (or MOC) orders on the other side. When this occurs, the No Indicative Price field displays either a Market Buy or Market Sell indicating that offsetting imbalance only orders should be entered on the other side of the market.
 - For the midday opening process, the Current Inside Match Price, the Near Indicative Clearing Price and the Far Indicative Clearing Price will be equal.
- **Near Indicative Clearing Price (NICP):** The crossing price at which orders in the NASDAQ opening/closing book and continuous book clear against each other. If this field is null or blank, this indicates one of two circumstances:
 - There are no on-open (or on-close) orders entered for the security; or
 - There is no substantial on-open (or on-close) or continuous book interest on the opposite side of the market to execute all of the MOO (or MOC) orders on the other side. When this occurs, the No Indicative Price field displays either a Market Buy or Market Sell indicating that offsetting imbalance-only or continuous market orders should be entered on the other side of the market.
 - For the midday opening process, the Current Inside Match Price, the Near Indicative Clearing Price and the Far Indicative Clearing Price will be equal.
- **Number of shares Paired (NSP):** The total number of shares that are eligible to be matched at the Current Inside Match Price.
 - For the Opening Cross, this calculation will include early "Regular Hours", Market On Open, Limit On Open, and Imbalance Only orders that are eligible to be matched at the Current Inside Match Price.
 - For the IPO and trading halt opening process, this calculation would include regular hour orders and quotes that are eligible to be matched at the Current Inside Match Price.
 - For the Closing Cross, this calculation will include Market On Close, Limit On Close, and Imbalance Only Orders that are eligible to be matched at the Current Inside Match Price.
 - The Number of Shares Paired may be zero-filled under the following two scenarios:
 - There are no on-open/on-close orders in the NASDAQ book. In this case, the Imbalance Side field would be set to "O".
 - There are no shares in the eligible order types that match at the Current Inside Match Price

- **No Indicative Clearing Price (cNOICP):** indicator when one of the sides doesn't have a price
- **Price Variance Indicator (PVI):** This field indicates the absolute value of the percentage of deviation of the Near Indicative Clearing Price to the nearest Current Reference Price.
 - Price Variance Indicator = (Near Indicative Clearing Price – Current Inside Price)
 - This field indicates the % difference between the indicative Opening/ Closing Cross price (Near Clearing Price) and the price where the market is currently trading. A high value indicates there will be a large price difference between the Opening/ Closing Cross price and the continuous market if sufficient offsetting interest is not entered.
- **Number of shares Imbalanced (NSI):** For the Opening Cross, this field indicates the absolute difference between the number of shares for early “Regular Hours”, Market On Open, Limit On Open and Imbalance Only orders on the buy side and the number of shares for early “Regular hours”, Market On Open, Limit On Open and offsetting Imbalance Only orders on the sell side eligible to be matched at the Current Inside Match price.
 - For the IPO and trading halt opening process, imbalance information will only be disseminated when there is a Market Buy or Market Sell condition.
 - For the Closing Cross, this field indicates the absolute difference between the number of shares for Market On Close, Limit On Close and offsetting Imbalance Only orders on the buy side and the number of shares for Market On Close, Limit On Close, and offsetting Imbalance Only orders on the sell side eligible to be matched at the Current Inside Match Price.
 - For the opening and closing crosses, the Number of Shares of Imbalance may be zero-filled under the following scenarios:
 - There are no on-open/on-close orders in the NASDAQ book. In this case, the Imbalance Side field would be set to “O”.
 - There is no imbalance; all shares in eligible orders can be paired at current inside match price. In this case, the Imbalance Side would be set to “NoImb”.

Market Depth +

ICE NYSE - Book By Price Net Order Imbalance

Side: Bid CIMP: 92.35 FICP: 0.00 NICP: 93.36 NSP: 30799 cNoICP: PVI: NMSI: 0 AT: Market (9:30am)

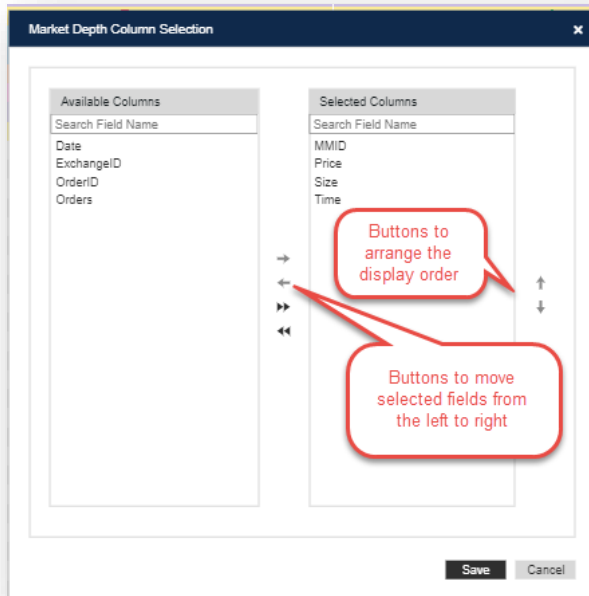
Symbol: ICE Net Change: -2.06 Previous: 92.35 Ask: 91.33 Ask Size: 1 Low: 90.16 Trade Size: 1 52Wk Low: 63.51 ExHOURS:
 Last: 90.29 Volume: 2.33M Bid: 90.30 Bid Size: 7 High: 94.20 Open: 93.51 52Wk High: 101.93 Open Interest: Trade Exchange:

MMID	Bid	Size	Time	MMID	Ask	Size	Time
NYSE	90.29	148	16:02:00	NYSE	90.34	5	15:59:59

Market Depth Right Click:

Columns
Edit ▶
Add to Symbol List
View ▶
Defaults ▶
Display Preferences...

Columns: allows you to select which fields are displayed in the columns



Edit: allows you to do the following

- Copy as text
- Best fit (the column you clicked in)
- Best fit all columns

Add to Symbol List: allows you to add the selected symbol to a Watch List you've created

View: allows you to view the selected symbol in another widget

Defaults: allows you to save and apply properties you've changed for your current Market Depth widget to other Market Depth widget on a case by case basis

Display Preferences: allows you to adjust display preferences that will apply to your current Market Depth widget

Market Depth Display Preferences

View: allows you to change the view from the following options

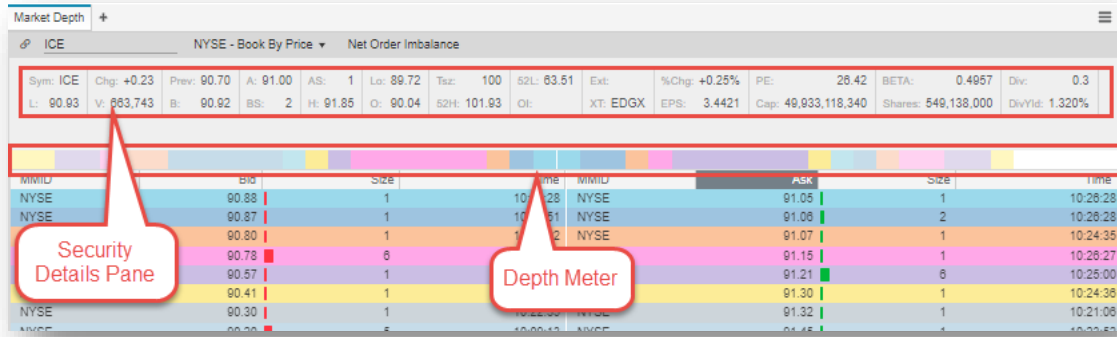
- **Side by Side:** bids are on the left side, asks on the right and each line is an individual order
- **Depth of Market:** bids are on the bottom left side, offers on the top right side and each line is an individual order with the middle where bid and offers meet showing where trades are executing
- **Mirror:** bids are on the left, asks on the right, with the columns repeating on the ask side from right to left



Panels: allows you to turn on or off the following additional panels

- Security Details

- Depth Meter



Appearance: allows you to change the colors for each level

Formatting: allows you to enable or disable the following

- Month Name (Commodities)
- Short Label
- Show full precision on non-trade data: non-trade data refers to non-pricing data like Volume
- Show full precision on trade data: trade data refers to pricing data like Last

Forex

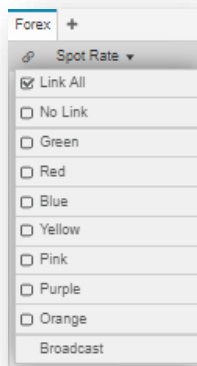
The Forex widget allows you to view the current spot rates and forwards across currencies.

	USD	EUR	CAD	GBP	CHF	CNY	JPY						
USD	1.08262 L 1.07867 H 1.08338	+0.00319		1.2369 L 1.2286 H 1.2419	+0.0029	0.973360 L 0.972910 H 0.973840	-0.001460	7.082400 L 7.083300 H 7.107000	-0.020700	106.248 L 105.993 H 106.660	+0.189		
EUR	0.9232 L 0.9233 H 0.9265	-0.0027	0.6604 L 0.6556 H 0.6625	+0.0059	1.14208 L 1.13819 H 1.14812	-0.0072	0.9484 L 0.9490 H 0.9497	-0.0009	0.13031 L 0.13032 H 0.13097	-0.00005	0.0086909 L 0.0086886 H 0.0087344	-0.0000396	
CAD	0.71533 L 0.70873 H 0.71638	+0.00903	1.513180 L 1.507880 H 1.520500	-0.014320	1.728890 L 1.720960 H 1.736250	-0.017320	1.4352 L 1.4326 H 1.4329	-0.0149	0.1969 L 0.1978 H 0.1980	-0.0019	0.013150 L 0.013125 H 0.013184	-0.000184	
GBP	0.80838 L 0.80568 H 0.81152	-0.00180	0.875360 L 0.870900 H 0.878970	+0.00820	0.5780 L 0.5719 H 0.5805	+0.0059		0.8302 L 0.8275 H 0.8338	-0.0001	0.11404 L 0.11379 H 0.11493	+0.00004	0.007603 L 0.007582 H 0.007644	-0.000029
CHF	1.02727 L 1.02230 H 1.02763	+0.00235	1.053790 L 1.052420 H 1.054170	+0.001370	0.69632 L 0.68780 H 0.69883	+0.00774	1.203960 L 1.198730 H 1.208290	+0.001160		0.1370 L 0.1369 H 0.1378	+0.0001	0.009151 L 0.009153 H 0.009156	-0.000038
CNY	0.14115 L 0.14074 H 0.14115	+0.00044	7.6685 L 7.6343 H 7.6730	+0.0007	5.0677 L 5.0166 H 5.0708	+0.0488	8.7644 L 8.6990 H 8.7905	-0.0037	7.2766 L 7.2467 H 7.2966	-0.0067		0.06664 L 0.06651 H 0.06685	-0.00028
JPY	0.0094107 L 0.0093768 H 0.0094333	-0.0000143	115.050000 L 114.485000 H 115.090000	+0.527000	76.015000 L 74.792000 H 78.209000	+1.063000	131.433 L 130.671 H 132.025	+0.521	109.158000 L 108.718000 H 109.286000	+0.410000	14.977 L 14.930 H 15.023	+0.063	

Forex Title Bar



Linking: Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Forex to Green Chart

Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Forex Instrument Selector: allows you to select which instrument type to be displayed in the widget with the following options

- Spot Rate
- 1 Week Forward
- 2 Weeks Forward
- 1 Month Forward
- 2 Months Forward

Edit: Allows you to change which currencies appear, currency labels and the layout of the data in Forex display preferences

Forex Right Click:



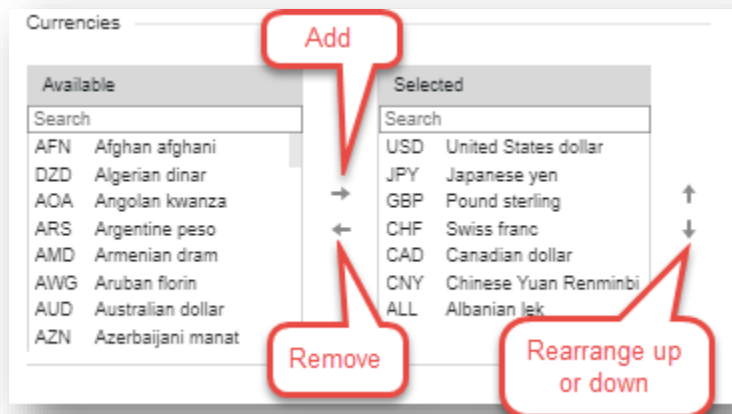
View: allows you to view the selected symbol in another widget

Defaults: allows you to restore the widget to its default settings

Display Preferences: allows you to adjust display preferences that will apply to your current Forex widget

Forex Display Preferences

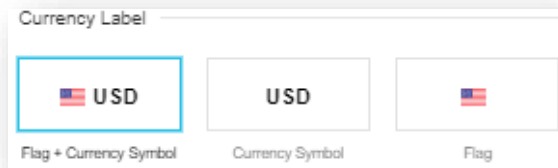
Currencies: allows you to add or remove currencies and rearrange the order of using the selection arrows to control the currencies display in your forex widget



Currency Label: allows you to select how the currency labels appear with the following options

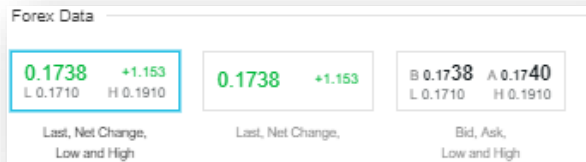
- Flag + Currency Symbol

- Currency Symbol
- Flag



Forex Data: allows you to select how the data is displayed in each data box from the following options

- Last, Net Change, Low and High
- Last, Net Change
- Bid, Ask, Low and High



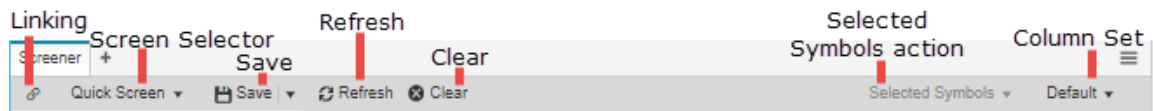
Screener

The Screener widget allows you enter various criteria to end with a list of symbols that meets the criteria as a result in the main grid. The criteria intervals can also be updated

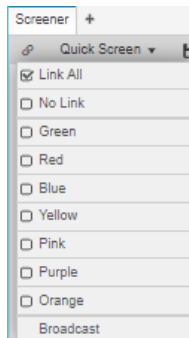
to dynamically update the results.

Symbol	Time	Last	Date	Open	High	Net Change	% Change
ABX-TC	14:13:35	38.00	05/07/20	38.01	38.85	+1.08	+2.88%
AEM-TC	14:13:36	92.77	05/07/20	90.00	93.09	+3.21	+3.56%
AJA-TC	14:13:32	19.24	05/07/20	19.37	19.72	+0.10	+0.52%
AGN-TC	14:13:33	10.10	05/07/20	10.40	10.43	-0.11	-0.64%
ASR-TC	14:13:25	8.05	05/07/20	7.71	8.06	+0.44	+5.78%
ATA-TC	14:13:12	21.23	05/07/20	21.10	21.41	+0.22	+1.05%
ATD-B-TC	14:13:34	39.99	05/07/20	39.98	40.46	+0.17	+0.43%
ATD-B-TC	14:13:33	39.94	05/07/20	39.61	40.10	+0.02	+0.05%
ATZ-TC	14:13:11	15.26	05/07/20	14.91	15.41	+0.43	+2.90%
BAM-A-TC	14:13:39	46.79	05/07/20	46.00	47.22	+0.98	+2.14%
BCE-TC	14:13:35	69.84	05/07/20	67.55	67.68	+0.28	+0.81%
BTO-TC	14:13:33	8.00	05/07/20	7.70	8.02	+0.33	+4.30%
BYD-TC	14:12:23	194.00	05/07/20	191.85	194.95	+0.45	+0.23%
CAE-TC	14:13:29	21.48	05/07/20	21.99	22.28	-0.30	-1.35%
CAS-TC	14:13:01	13.88	05/07/20	13.78	14.20	+0.41	+3.05%
CCLA-TC	14:01:21	45.52	05/07/20	45.52	45.52	-0.48	-1.04%
CCL-B-TC	14:13:32	44.23	05/07/20	45.92	45.92	-1.13	-2.49%
CSF-TC	14:13:19	21.70	05/07/20	21.71	21.72	-0.03	-0.14%
CIGI-TC	14:13:34	70.35	05/07/20	71.25	72.25	+0.33	+0.47%
CIX-TC	14:13:34	14.09	05/07/20	13.99	14.59	+0.44	+3.22%
CU-TC	14:13:34	32.28	05/07/20	32.88	32.90	-0.18	-0.55%
CU-K-TC	14:13:34	22.38	05/07/20	22.38	22.38	-0.49	-1.49%
CWB-TC	14:13:32	20.79	05/07/20	21.00	21.18	-0.08	-0.38%
DOL-TC	14:13:34	43.49	05/07/20	43.34	43.59	+0.73	+1.71%
DOO-TC	14:13:28	38.39	05/07/20	38.37	37.08	+0.61	+1.70%
FT	14:13:35	-13.94	04/07/20	-13.74	-13.81	+0.11	+0.96%

Screener Title Bar



Linking: Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

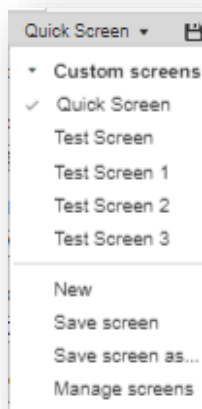
No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Screener to Green Chart

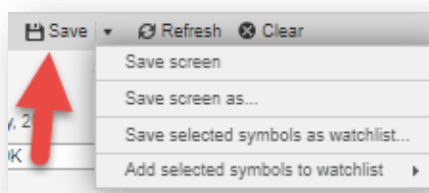
Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Screen Selector: allows you to open a saved screen, perform a quick screen, and create and save new screens with the following options

- **Custom Screen:** Shows all your saved screens
- **Quick Screen:** Allows you to create a new screen without saving it at the start
- **New:** Allows you to create a new saved screen
- **Save Screen:** Allows you to save updates to a screen
- **Save Screen as:** Allows you to save a new screen or a new copy of a currently saved screen
- **Manage Screens:** Opens Screens manager and allows you to open, copy, or delete saved screens, or create a new screen



Save: allows you to save Screens and or save selected symbols from screen results with the following options



- **Save Screen:** allows you to save updates to a screen
- **Save Screen as:** allows you to save a new screen or a new copy of a currently saved screen
- **Save Selected Symbols as Watchlist:** Allows you to select symbols that are results of a screen and save them as a new watchlist. After you select the

symbols and the option to save selected symbols as a watch list a dialog box will appear to name your new watch list.

<input type="checkbox"/>	Symbol	Time	Last	Date	Open	High	Net Chan	% Chang
<input checked="" type="checkbox"/>	ACA	3:54:24	35.33	05/05/...	35.45	36.34	+0.53	+1.52%
<input type="checkbox"/>	AHH	3:54:19	8.99	05/05/...	9.13	9.26	+0.05	+0.56%
<input checked="" type="checkbox"/>	AIN	3:54:20	50.78	05/05/...	52.29	52.58	-0.26	-0.51%
<input checked="" type="checkbox"/>	AIR	3:54:18	17.63	05/05/...	18.49	18.98	-0.34	-1.89%
<input type="checkbox"/>	AIZ	13:54:00	102.79	05/05/...	101.05	103.66	+2.79	+2.79%
<input type="checkbox"/>	ALE	13:54:18	57.20	05/05/...	56.58	58.05	+1.66	+2.99%
<input type="checkbox"/>	AMG	13:54:14	68.10	05/05/...	68.27	68.61	+0.26	+0.39%

Save selected symbols as watchlist ✕

Symbol List Name

- **Add Selected Symbols to a watchlist:** allows you to select symbols that are results of a screen and save them to an existing saved watchlist. Use the carrot to select from your existing watchlists

Save Refresh Clear

- Save screen
- Save screen as...
- Save selected symbols as watchlist...
- Add selected symbols to watchlist ▶

- MY WL 1
 - MY WL 2

Refresh: allows you to manually refresh your screen results

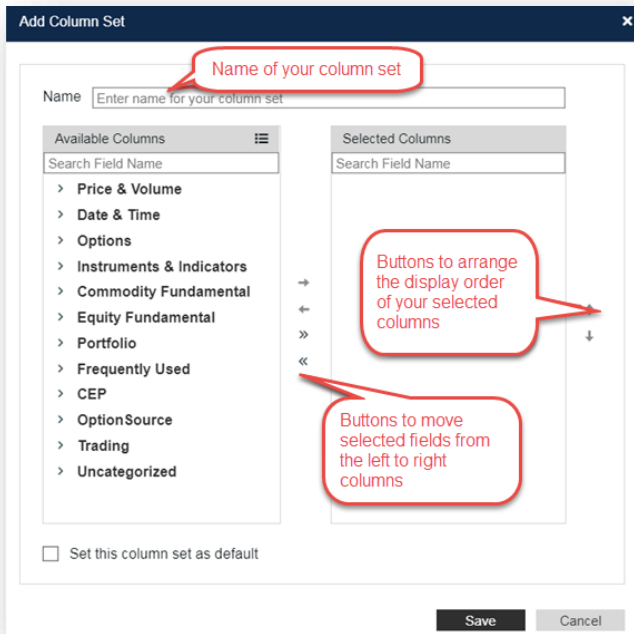
Clear: allows you to clear all the entered screen criteria

Selected Symbols Action: when symbols are selected from screen results this drop down will be accessible with the following options

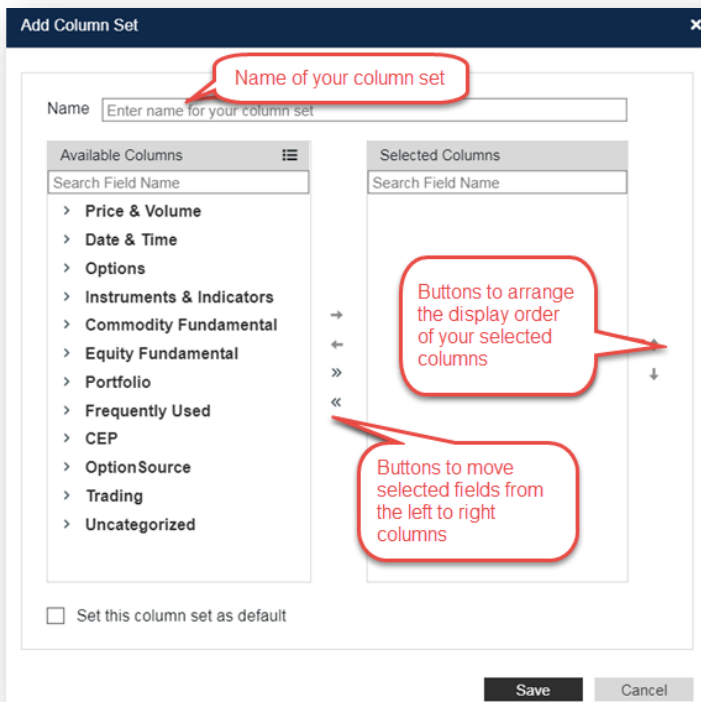
- **Save Selected Symbols as Watchlist:** allows you to select symbols that are results of a screen and save them as a new watchlist. After you select the symbols and the option to save selected symbols as a watch list a dialog box will appear to name your new watch list.
- **Add Selected Symbols to a Watchlist:** allows you to select symbols that are results of a screen and save them to an existing saved watchlist. Use the carrot to select from your existing watchlists
- **View Symbols in:** allows you to view selected symbols from the screen results in other widgets
- **Sort Selected Symbols to Top:** allows you to sort selected symbols from the screen results to the top of the screen results

Column Set: allows viewing and selecting of predefined and custom columns sets with the option to create new, save and manage column sets

New: This is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.

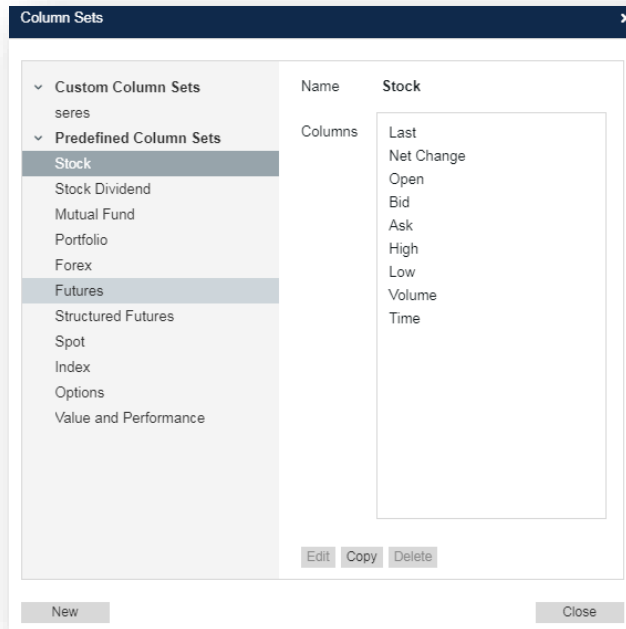


Save column set: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns



Managing Column Sets: allows you to update your Custom Column Set by:

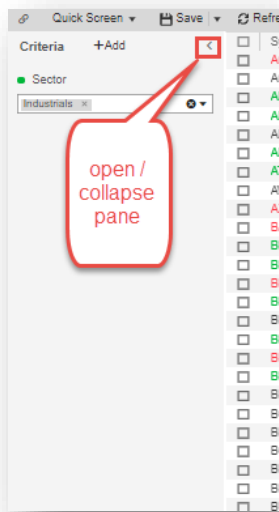
- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.
- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side



Screeener Main View

Criteria	Symbol	Time	Last	Date	Open	High	Net Change	% Change
Market Cap	ABX-TC	14:13:35	38.80	05/07/20	38.01	38.55	+1.08	+2.88%
	ABM-TC	14:13:35	92.77	05/07/20	90.00	93.05	+3.21	+3.56%
	ALA-TC	14:13:32	16.34	05/07/20	15.37	16.72	+0.10	+0.62%
	ACN-TC	14:13:33	19.18	05/07/20	19.40	19.43	-0.11	-0.54%
	ASR-TC	14:13:25	8.05	05/07/20	7.71	8.08	+0.44	+5.78%
	ATA-TC	14:13:12	21.23	05/07/20	21.10	21.41	+0.22	+1.05%
	ATA-A-TC	14:13:34	39.99	05/07/20	39.88	40.45	+0.17	+0.43%
	ATD-B-TC	14:13:33	39.84	05/07/20	39.81	40.10	+0.02	+0.05%
	ATZ-TC	14:13:11	15.26	05/07/20	14.91	15.41	+0.43	+2.90%
	BAMA-TC	14:13:35	46.75	05/07/20	46.00	47.22	+0.68	+1.44%
	BCE-TC	14:13:35	59.64	05/07/20	57.55	57.58	-0.29	-0.51%
	BTO-TC	14:13:33	8.00	05/07/20	7.76	8.02	+0.33	+4.30%
	BYD-TC	14:12:23	194.00	05/07/20	191.65	194.95	+0.45	+0.23%
	CAE-TC	14:13:28	21.42	05/07/20	21.09	22.25	-0.30	-1.38%
	CAS-TC	14:13:01	13.89	05/07/20	13.76	14.29	+0.41	+3.05%
	CCLA-TC	14:01:21	45.52	05/07/20	45.52	45.52	-0.48	-1.04%
	CCLB-TC	14:13:32	44.23	05/07/20	45.92	45.92	-1.13	-2.49%
	CEF-TC	14:13:10	21.70	05/07/20	21.71	21.72	-0.03	-0.14%
	CIGI-TC	14:13:34	70.35	05/07/20	71.29	72.29	+0.33	+0.47%
	CIX-TC	14:13:34	14.09	05/07/20	13.99	14.59	+0.44	+3.22%
	CU-TC	14:13:34	32.25	05/07/20	32.88	32.90	-0.18	-0.55%
	CU-X-TC	14:13:34	32.35	05/07/20	32.38	32.38	-0.49	-1.49%
	CHB-TC	14:13:32	20.79	05/07/20	21.00	21.13	-0.08	-0.38%
	DOL-TC	14:13:34	43.49	05/07/20	43.34	43.59	+0.73	+1.71%
	DOO-TC	14:13:28	38.39	05/07/20	38.37	37.08	+0.61	+1.70%
	FLN-TC	14:13:35	13.50	05/07/20	13.21	13.61	+0.53	+4.08%

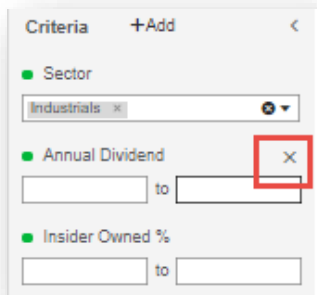
Criteria Pane: allows you to add, remove, and adjust criteria intervals as well as hide the pane using the carrot in the top right corner of the pane



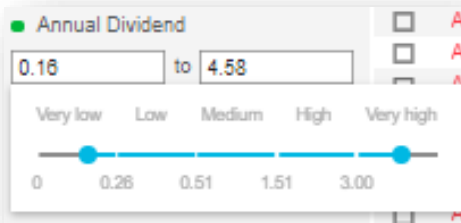
Add: opens a drop-down menu with frequently used criteria, clicking “more...” at the bottom of the menu will open the Criteria manager to find more criteria you may want to add.



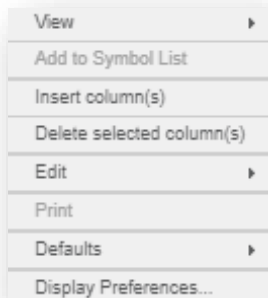
Remove: allows you to remove a criteria by clicking the “x” that appears when hovering over a criteria



Adjust: allows you to adjust the interval of the criteria by either clicking in the box and dragging the dot selector, or by typing a value into the box



Screener Right Click:



View: allows you to view the selected symbol in another widget

Add to Symbol list: allows you to add the selected symbol to a Watch List you've created

Insert Column(s): allows you to insert column(s) to the grid

Delete selected column(s): allows you to delete selected column(s) on the grid

Edit: allows you to do the following

- Copy as text
- Select all
- Clear selection

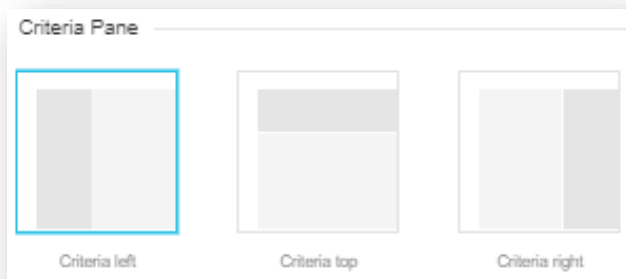
Defaults: allows you to save and apply properties you've changed for your current Screener widget to other Screener widget on a case by case basis

Display Preferences: allows you to adjust display preferences that will apply to your current Screener widget

Screener Display Preferences

Criteria Pane: allows you to select where the criteria pane will display from the following

- Criteria Left
- Criteria Top
- Criteria Right



Data: allows you to enable or disable auto refreshing data, as well as when enabled select the interval of the auto refresh

Append Criteria as Columns: allows you to enable or disable criteria added to the criteria pane being dynamically added to the grid as columns

Symbol Field: allows preference changes for:

- Show symbol as description
- Click action -- what happens when you click on a symbol cell
- Double click action -- what happens when you double click on a symbol cell
- Show 52 week high/low indicators
- Activity indicator color

Formatting: allows preference changes for:

- Show full precision on non-trade data: non-trade data refers to non-pricing data like Volume

- Show full precision on trade data: trade data refers to pricing data like Last

52 Week Indicator: allows preference changes for:

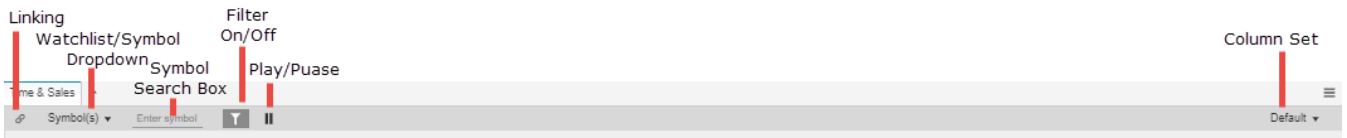
- Font color
- Outline color
- Slider color
- Fill color

Time and Sales

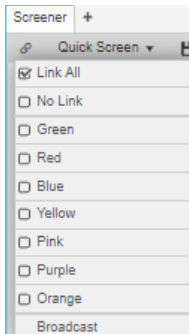
The Time and Sales window displays real time streaming updates for quotes and trades from multiple exchanges in one window. As new data is received it will display at the top of the window and the older data will move down the window and is accessible by scrolling.

Symbol	Date	Time	Bid	Price	Ask	Size	Type	Condition
ICE	07/20/2020	15:09:22	94.21	94.23	94.23	3x5		
ICE	07/20/2020	15:09:19		94.23	94.23	4	Trade	OddLot
ICE	07/20/2020	15:09:09	94.21	94.23	94.23	3x4		
ICE	07/20/2020	15:09:01	94.21	94.23	94.23	2x4		
ICE	07/20/2020	15:09:00		94.21	94.21	100	Trade	InitMktSwp
ICE	07/20/2020	15:09:00	94.20	94.22	94.22	3x4		
ICE	07/20/2020	15:09:00		94.21	94.21	99	Trade	InitMktSwp, OddLot
ICE	07/20/2020	15:08:48	94.21	94.23	94.23	2x4		
ICE	07/20/2020	15:08:48		94.21	94.21	3	Trade	OddLot
ICE	07/20/2020	15:08:48	94.21	94.23	94.23	2x4		
ICE	07/20/2020	15:08:47	94.20	94.21	94.21	100	Trade	
ICE	07/20/2020	15:08:45	94.20	94.21	94.21	2x1		
ICE	07/20/2020	15:08:45		94.20	94.20	55	Trade	OddLot
ICE	07/20/2020	15:08:43	94.20	94.21	94.21	2x2		
ICE	07/20/2020	15:08:43		94.21	94.21	20	Trade	OddLot
ICE	07/20/2020	15:08:42	94.20	94.21	94.21	1x2		
ICE	07/20/2020	15:08:42		94.21	94.21	2400	Trade	
ICE	07/20/2020	15:08:41	94.20	94.21	94.21	1x3		
ICE	07/20/2020	15:08:41		94.21	94.21	8	Trade	InitMktSwp, OddLot
ICE	07/20/2020	15:08:41	94.20	94.21	94.21	1x3		

Time and Sales Title Bar



Linking: Linking allows you to pass symbol between two or more widgets. This is controlled by selecting the Link Icon at the top left of the title bar. Note, you can also drag and drop symbols between widgets.



Link All: this will link your widget to all other widgets by default. This is the most common type of linking between widgets.

No Symbol Link: this will not link your widget to any widgets

Colors: this will allow you to isolate linkage to like colors without affecting other widget links, for example Green Screener to Green Chart

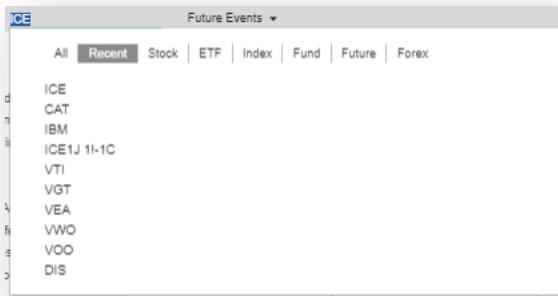
Broadcast: this will allow a symbol entered in this widget will be sent to all other widgets that are linked

Watch List / Symbol Selection Menu: allows you to enter individual symbols, view active symbols, watchlists, or market indices.

Symbol Search Box: this is our symbol entry and symbol search entry point.

Typing in a symbol and hitting enter will return relevant information related to that symbol. Typing in an instrument description will allow you to view and choose potential matches to your text based on:

- All related
- Recent searches
- Stocks
- ETF
- Index
- Fund
- Future
- Forex



Filter Button: allows you to display or hide the filter pane

Play/Pause: allows you to pause and play the scrolling quotes and trades

Column Set: allows viewing and selecting of predefined and custom columns sets with the option to create new, save and manage column sets

New: This is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side.

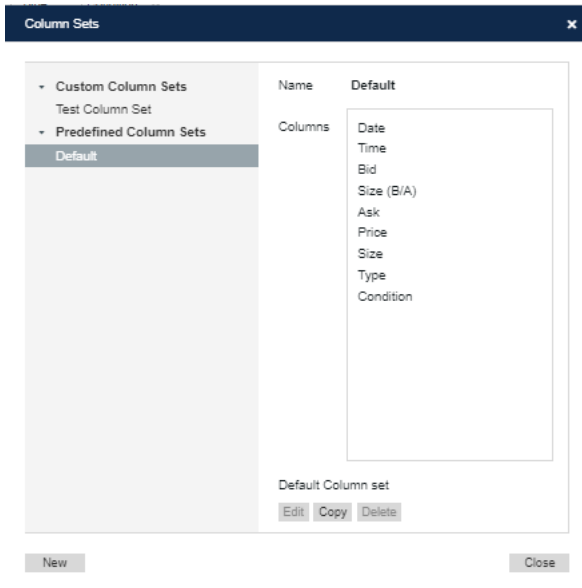


Save column set: allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns



Managing Column Sets: allows you to update your Custom Column Set by:

- **Edit:** you can edit your new column set by adding or removing columns
- **Copy:** allows you to make a copy of your current column setup, you can edit your new column set by adding or removing columns
- **Delete:** allows you to delete a custom column set.
- **New:** this is an option to create a new column set. A dialog will prompt you to enter a name for the new column set. You can choose fields from the left side and using arrows in the middle, add selected fields to the right side



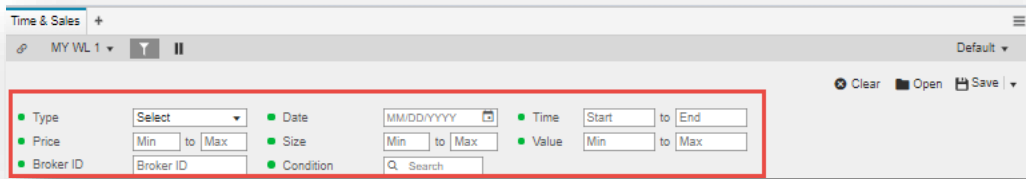
Time and Sales Main View

Symbol	Date	Time	Bid	Size (B/A)	Ask	Price	Size	Type	Condition
ICE	07/20/2020	15:09:22	94.21	3x5	94.23	94.23	4	Trade	OddLot
ICE	07/20/2020	15:09:19							
ICE	07/20/2020	15:09:09	94.21	2x4	94.23	94.23			
ICE	07/20/2020	15:09:01	94.21	2x4	94.23	94.23			
ICE	07/20/2020	15:09:00				94.21	100	Trade	ImMktSwp
ICE	07/20/2020	15:09:00	94.20	3x4	94.22				
ICE	07/20/2020	15:09:00				94.21	99	Trade	ImMktSwp, OddLot
ICE	07/20/2020	15:08:48	94.21	2x4	94.23				
ICE	07/20/2020	15:08:48				94.21	3	Trade	OddLot
ICE	07/20/2020	15:08:48	94.21	2x4	94.23	94.21			
ICE	07/20/2020	15:08:48				94.21	100	Trade	
ICE	07/20/2020	15:08:47	94.20	2x1	94.21				
ICE	07/20/2020	15:08:45				94.20	55	Trade	OddLot
ICE	07/20/2020	15:08:43	94.20	2x2	94.21				
ICE	07/20/2020	15:08:43				94.21	20	Trade	OddLot
ICE	07/20/2020	15:08:42	94.20	1x2	94.21				
ICE	07/20/2020	15:08:42				94.21	2400	Trade	
ICE	07/20/2020	15:08:41	94.20	1x3	94.21				
ICE	07/20/2020	15:08:41				94.21	8	Trade	ImMktSwp, OddLot
ICE	07/20/2020	15:08:41	94.20	1x3	94.21				

Filter Pane: pane at the top of the main view with dropdown menus and entry boxes to select, multiselect, unselect, or search from the following categories:

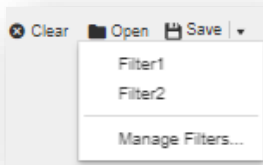
- Type
- Price
- Broker ID
- Date
- Size
- Condition

- Time
- Value

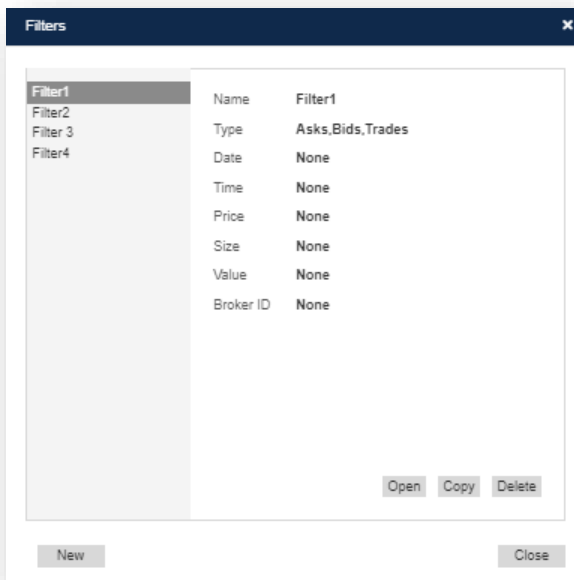


Clear: allows you to clear any filter inputs or selections made

Open: allows you to open a saved filter or open the manage filters window



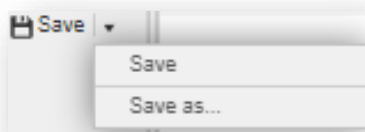
Manage Filters: allows you to view, open, copy or delete an existing filter and create new filters



- **View:** clicking on saved filters in the left pane of the window will display the filter criteria for that saved filter
- **Open:** opens the saved filter
- **Copy:** creates a copy of the filter criteria from an existing saved filter and name and save it as a new filter
- **Delete:** allows you to delete a selected saved filter
- **New:** allows you to create a new filter

Save: allows you to save filters

- **Save:** clicking the save button will overwrite opened existing saved filters, if there is no existing saved filter open it will allow you to name the new saved filter
- **Save As:** found in the drop down next to the save icon, allows you to save a saved the filter as a new saved filter



Column Sorting: double clicking on a column header allows you to sort by ascending or descending order

Time	Bid (\$)	Size (B/A)
14:53:21	1587.95	0x0
14:53:21	387.36	1x2
14:53:21	1588.04	1x1
14:53:21	387.40	1x1
14:53:19		0x0
14:53:19	387.42	1x2
14:53:18	1588.04	1x2
14:53:18	387.42	1x1
14:53:18	1588.11	1x1

Inline column rearrangement: clicking, holding, and dragging column headings allow you to rearrange their order inline

Symbol	Time	Date	Bid Price	Time
CCL	14:58:24	07/22/2020	15.12	
AAPL	14:58:24	07/22/2020	387.43	
CCL	14:58:23	07/22/2020	15.12	
TSLA	14:58:23	07/22/2020	1805.53	
AAPL	14:58:22	07/22/2020	387.44	
TSLA	14:58:22	07/22/2020	1805.53	
AAPL	14:58:22	07/22/2020	387.43	
TSLA	14:58:22	07/22/2020	1805.53	
CCL	14:58:22	07/22/2020	15.12	

Date	Time
07/22/2020	15:00:03
07/22/2020	15:00:03
07/22/2020	15:00:02
07/22/2020	15:00:02
07/22/2020	15:00:02
07/22/2020	15:00:02
07/22/2020	15:00:02
07/22/2020	15:00:01

Scroll Bar: Allows you to scroll backwards or forwards

Symbol	Date	Time	Bid P	Size (B/A)	Ask	Price	Size	Type	Condition
TSLA	07/22/2020	14:23:32	1577.15	1x1	1578.02				
CCL	07/22/2020	14:23:32	15.08	85x24	15.09				
AAPL	07/22/2020	14:23:31	387.39	0x0			3	Bid	
TSLA	07/22/2020	14:23:31	1577.21	1x1	1578.02				
AAPL	07/22/2020	14:23:30	387.40	2x1	387.42				
ICE	07/22/2020	14:23:30	95.80	2x3	95.82				
CCL	07/22/2020	14:23:30	15.08	85x14	15.09				
AAPL	07/22/2020	14:23:29	387.39	0x0	387.42		2	Ask	
AAPL	07/22/2020	14:23:29	387.39	3x1	387.42				
TSLA	07/22/2020	14:23:29	1577.15	1x1	1578.01				
AAPL	07/22/2020	14:23:29	387.39	0x0	387.43		3	Ask	
TSLA	07/22/2020	14:23:29	1577.02	0x0			1	Bid	
CCL	07/22/2020	14:23:29	15.08	0x0	15.09		6	Ask	
TSLA	07/22/2020	14:23:29	1577.02	0x0	387.43		1	Bid	
AAPL	07/22/2020	14:23:29	387.39	3x2	387.43				
TSLA	07/22/2020	14:23:28	1577.29	1x1	1578.01				
AAPL	07/22/2020	14:23:28	387.39	1x2	387.43				
TSLA	07/22/2020	14:23:28	1577.01	2x1	1578.15				
TSLA	07/22/2020	14:23:28	1577.03	1x1	1578.01				
AAPL	07/22/2020	14:23:27	387.40	1x1	387.43				
AAPL	07/22/2020	14:23:26	387.39	2x2	387.43				
TSLA	07/22/2020	14:23:26	1577.01	2x1	1578.15				
CCL	07/22/2020	14:23:26	15.08	85x9	15.09				

Time and Sales Right Click:

- View
- Add to Symbol List
- Add to filter: Price = 383.73
- Add to filter: Price >= 383.73
- Add to filter: Price <= 383.73
- Defaults
- Display Preferences...

View: allows you to view the selected symbol in another widget

Add to Symbol list: allows you to add the selected symbol to a Watch List you've created

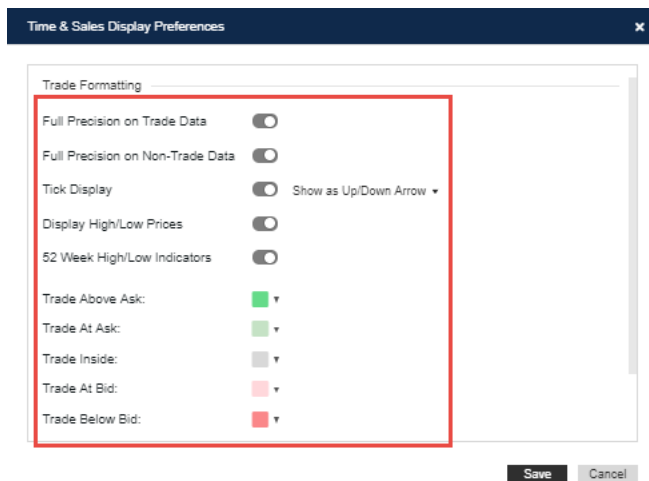
Add to filter: allows you to add a value to a filter criteria based on the field right clicked in

Defaults: allows you to save and apply properties you've changed for your current Time and Sales widget to other Screener widget on a case by case basis

Display Preferences: allows you to adjust display preferences that will apply to your current Time and Sales widget

Time and Sales Display Preferences

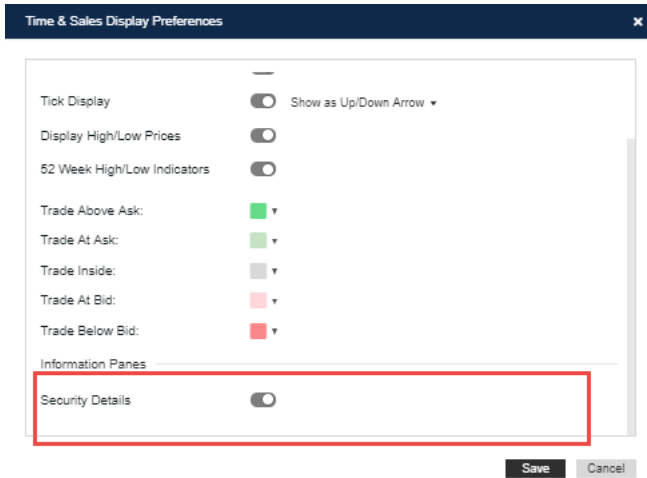
Trade Formatting:



- **Show full precision on non-trade data:** non-trade data refers to non-pricing data like Volume
- **Show full precision on trade data:** trade data refers to pricing data like Price
- **Tick Display:** allows you to enable or disable displaying ticks up/down with a set visual
- **Display High/Low Prices:** enable or disable display of the daily high or low price
- **52 Week High/Low Indicators:** allows you to enable or disable 52-week high low indicators

- **Color formatting:** allows you to change the color highlighting of a row for the following:
 - o Trade Above Ask
 - o Trade At Ask
 - o Trade Inside
 - o Trade At Bid
 - o Trade Below Bid

Option to display additional information panes:



- **Security Details:** shows security details on the symbol clicked on

The image shows a trading interface with a table of trade data. At the top, a summary bar is highlighted with a red box, containing fields like Symbol, Net Change, Volume, Bid, Ask, High, Low, Open, Trade Size, 52Wk High, 52Wk Low, Open Interest, Trade Exchange, % Change, PE, Market Cap, Shares, and Dividend Yield. Below this is a table with columns: Symbol, Date, Time, Bid, Size (B/A), Ask, Price, Size, Type, and Condition. A red arrow points to the first row of the table, which has the symbol "JD".

Symbol	Date	Time	Bid	Size (B/A)	Ask	Price	Size	Type	Condition
JD	07/23/2020	13:18:41	60.71	1x1	60.71	60.71	100	Trade	IntMktSwp
FB	07/23/2020	13:18:41	238.01	1x1	238.05	238.02	100	Trade	
CHKP	07/23/2020	13:18:41	124.94	1x2	125.00				
PAYX	07/23/2020	13:18:41				73.98	5	Trade	OddLot
FOXA	07/23/2020	13:18:41	28.34	8x9	28.35				
FB	07/23/2020	13:18:41				238.05	25	Trade	OddLot
CHKP	07/23/2020	13:18:41				124.93	11	Trade	OddLot
AMZN	07/23/2020	13:18:41				3023.8087	12	Trade	OddLot
UAL	07/23/2020	13:18:40				33.7201	24	Trade	OddLot
QCOM	07/23/2020	13:18:40				90.605	100	Trade	
MU	07/23/2020	13:18:40				53.215	100	Trade	
MSFT	07/23/2020	13:18:40				205.5328	1	Trade	OddLot
MNST	07/23/2020	13:18:40				75.89	13	Trade	OddLot
MCHP	07/23/2020	13:18:40				102.83	10	Trade	OddLot

Alerts

The Alerts Widget provides the ability to create customizable alerts ranging from quotes, news, screeners, and calendar alerts. Alerts can be managed in the widget and there are notifications for you as set alerts are triggered.

Alerts +

[Saved Alerts](#)
[Alerts History](#)
[+ New Alert](#)
[Import Quote Alerts](#)

Status	Priority	Name	Trigger Event	Note	Type	Last Triggered	Link to
Active	1	ICE	ICE High >= 1...		Quote		Watch List
Dismissed	2	News Alert	Biotechnology...		News	07/23/2020 1...	News
Active	3	Calendar Alert	Earnings Call		Calendar		Calendar

3 Alerts, 2 Active, 0 Triggered, 1 Dismissed

Alerts Title Bar



Saved Alerts: allows you to view your saved alerts

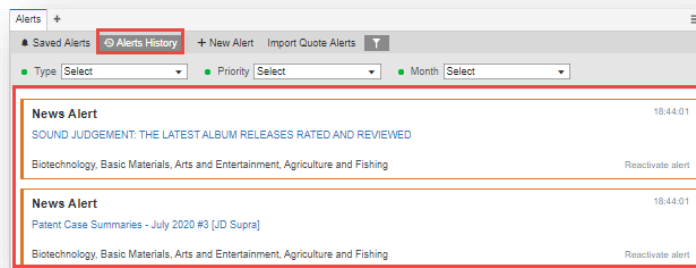
Alerts +

[Saved Alerts](#)
[Alerts History](#)
[+ New Alert](#)
[Import Quote Alerts](#)

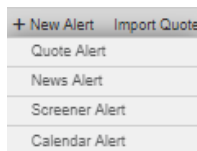
Type: Select Priority: Select

Status	Priority	Name	Trigger Event	Note	Type	Last Triggered	Link to
Active	1	ICE	ICE High >= 1...		Quote		Watch List
Dismissed	2	News Alert	Biotechnology...		News	07/23/2020 1...	News
Active	3	Calendar Alert	Earnings Call		Calendar		Calendar

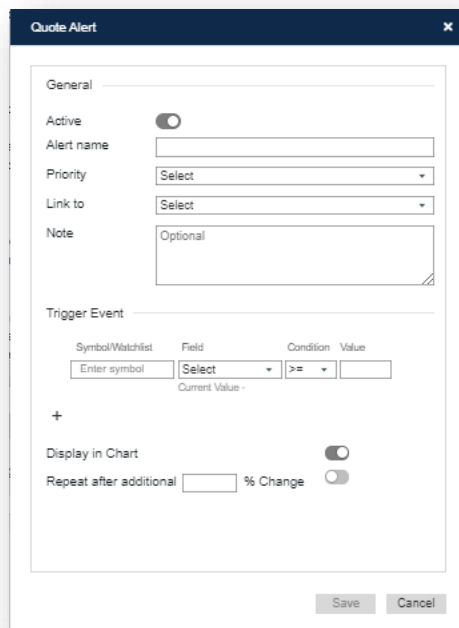
Alerts History: allows you to view your past triggered alerts



New Alert: allows you to select a new type of alert to create



Quote Alert: allows you to set an alert on a quote



- **Active:** toggle to set the alert be active or dismissed
- **Alert name:** allows you to set a name for the alert
- **Priority:** allows you to assign a priority to an alert with 1 being the highest and 3 being the least

- **Link to:** allows you to select a widget or page the alert should appear in
- **Note:** allows you to add an optional note for the alert
- **Trigger event:** allows you to add multiple events based on a symbol, field, condition, and value
- **Display in chart:** allows you to toggle on/off to have the alert display on the chart
- **Repeat after additional % change:** allows you define and toggle on/off a specific % change that will cause your alert to repeat

News Alert: allows you to set an alert on news

- **Active:** toggle to set the alert be active or dismissed
- **Alert name:** allows you to set a name for the alert
- **Priority:** allows you to assign a priority to an alert with 1 being the highest and 3 being the least
- **Link to:** allows you to select a widget or page the alert should appear in
- **Note:** allows you to add an optional note for the alert
- **Keyword/Symbol:** allows you enter a keyword or symbol as criteria for your alert
- **Industries:** allows you to select or multiselect industries as criteria for your alert
- **Geography:** allows you to select or multiselect regions as criteria for your alert

- **Services:** allows you to select or multiselect news services from the available news services
- **Topics:** allows you select or multiselect topics as criteria for your alert

Screener Alert: allows you to set an alert on your saved screens from the screener widget

- **Active:** toggle to set the alert be active or dismissed
- **Alert name:** allows you to set a name for the alert
- **Priority:** allows you to assign a priority to an alert with 1 being the highest and 3 being the least
- **Link to:** allows you to select a widget or page the alert should appear in
- **Note:** allows you to add an optional note for the alert
- **Screen(s):** allows you to select or multiselect screens for the alert
- **Added Tickers:** allows you enable or disable the alert for when tickers that are added to the selected screen(s)
- **Removed Tickers:** allows you enable or disable the alert for when tickers that are removed from the selected screen(s)

Calendar Alert: allows you set alerts based on calendar events and set criteria

Calendar Alert

General

Active

Alert name

Priority

Link to

Note

Trigger Event

Symbol(s)

Type

Days in advance

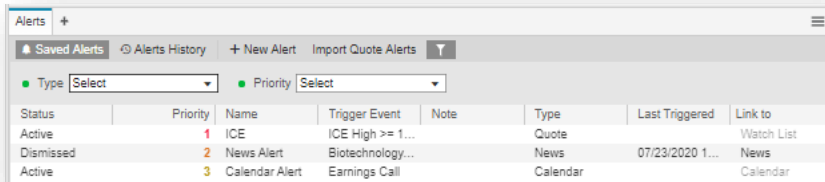
Save Cancel

- **Active:** toggle to set the alert be active or dismissed
- **Alert name:** allows you to set a name for the alert
- **Priority:** allows you to assign a priority to an alert with 1 being the highest and 3 being the least
- **Link to:** allows you to select a widget or page the alert should appear in
- **Note:** allows you to add an optional note for the alert
- **Symbol(s):** allows you to enter the symbol or symbols you want to be part of the alert
- **Type:** allows you to select or multiselect events to be alerted about for the listed symbol(s)
- **Days in Advance:** allows you to set how many days in advance you would like to be notified for the alert

Import Quote Alerts: allows you to import quote alerts from a .txt file

Filter Button: allows you to display or hide the filter pane

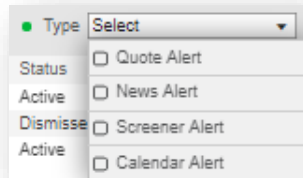
Alerts Main View



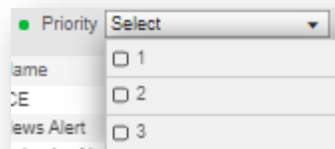
Status	Priority	Name	Trigger Event	Note	Type	Last Triggered	Link to
Active	1	ICE	ICE High >= 1...		Quote		Watch List
Dismissed	2	News Alert	Biotechnology...		News	07/23/2020 1...	News
Active	3	Calendar Alert	Earnings Call		Calendar		Calendar

Saved Alerts Filters: allow you to filter your alerts by:

- **Type:** type of alert set

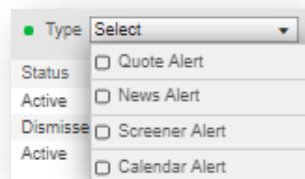


- **Priority:** priority assigned to alerts

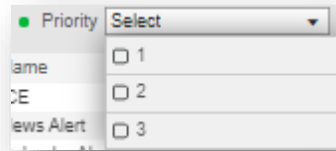


Alerts History Filter: Allows you to filter by type, priority, and month

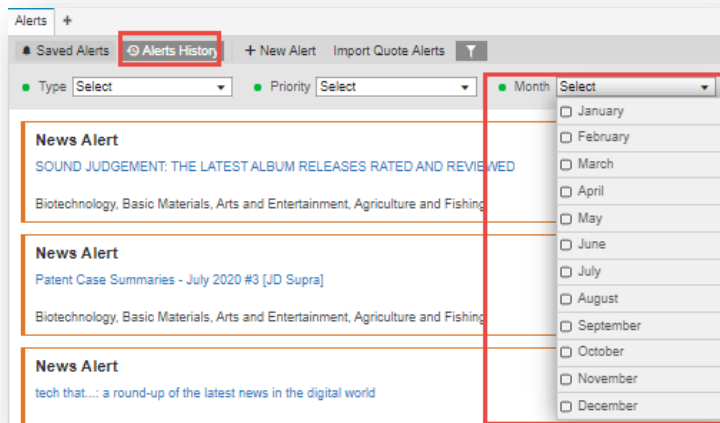
- **Type:** type of alert set



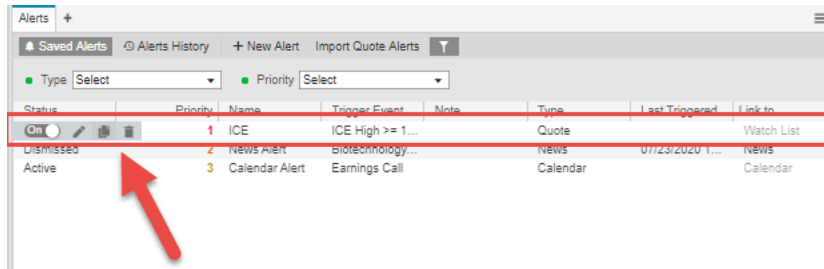
- **Priority:** priority assigned to alerts



- **Month:** allows you to filter by alerts set in one or multiple months



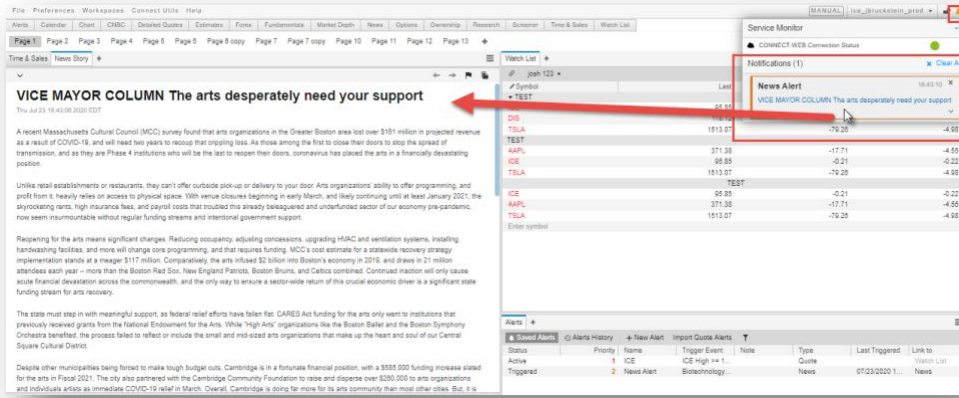
Alert Hover Over: Allows you to quickly activate/dismiss, edit, copy, or delete your alert



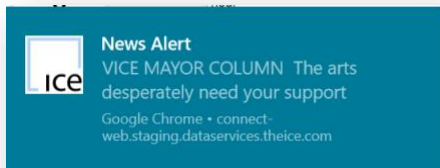
- **On/Off Toggle:** allows you to activate or dismiss the alert
- **Edit:** opens the alert input window for editing that alert
- **Copy:** opens a copy of the alert in the alert input window and allows for edits and saving
- **Trash Can:** allows you to delete an alert

Alert Notifications: When alerts are triggered there will be notifications in the notification section, and system notifications

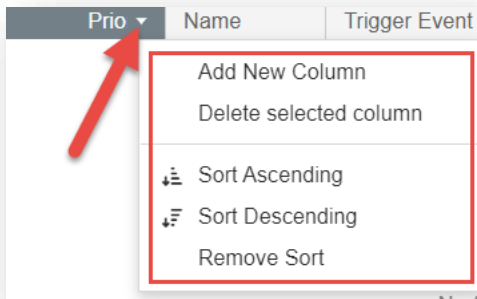
- **Notifications Section:** in the upper righthand corner the bell icon will light up and when clicked on you can view your triggered alerts, and click on them to open them



- **System Notifications:** allows you to get notifications for triggered alerts while the application is open, notification only and will not open the alert



Column Arrow: allows you to do the following:



- **Add New Column:** allows you to add a column
- **Delete Selected Column:** allows you to delete a column

- **Sort Ascending by:**
 - Status
 - Priority
 - Type
 - Last Trigger
- **Sort Descending by:**
 - Status
 - Priority
 - Type
 - Last Trigger
- **Remove sort:** allows you to remove applied sorting
- **Inline column rearrangement:** clicking, holding, and dragging column headings allow you to rearrange their order inline

Inline column rearrangement: clicking, holding, and dragging column headings allow you to rearrange their order inline



Alerts Right Click

View	▶
Add to Symbol List	▶
New	▶
Delete	
Edit	
Reactivate	
Dismiss	
Column(s)...	
Delete selected column	
Sort Ascending	
Sort Descending	
<input checked="" type="checkbox"/> Fit to Window Width	

View: allows you to view the selected symbol in another widget for quote alerts only

Add to Symbol list: allows you to add the selected symbol to a Watch List you've created for quote alerts only

New: allows you to create a new Quote, News, Screener, or Calendar Alert

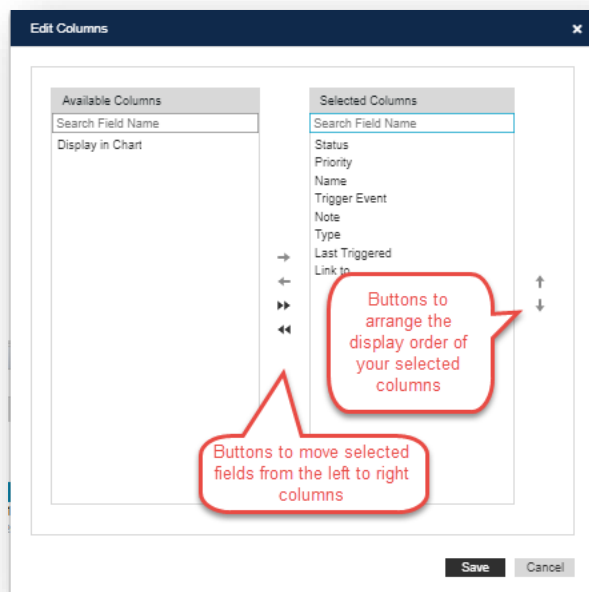
Delete: deletes the alert clicked on

Edit: allows you to edit the alert clicked

Reactivate: allows you to reactive a dismissed alert

Dismiss: allows you to dismiss an active alert

Columns: Opens the column set manager which allows you to add, remove, and rearrange columns



Delete Selected Column: allows you to delete the column clicked in

Sort Ascending by:

- Status
- Priority
- Type

- Last Trigger

Sort Descending by:

- Status
- Priority
- Type
- Last Trigger

Appendix

Trading Training Videos

Column/Field Header definition:

Field Label	Definition	Comments
%Return	Percent gain or loss since opening the position	
Annualized Investment Rate	The APR (Annual Percentage Rate) of the fixed rate account	
Capital Gain/Loss	Capital gain/loss is calculating based on equation (Exit price – Purch price) * Quantity	
Cost	Dollar gain or loss since opening the position	
Entry Date	Date on which the position was entered. (Only one entry date supported currently)	
Exit Date	Date on which the position was exited. (Only one entry date supported currently)	
Exit Price	Average Selling Price of position at time of exit	
Gain	Dollar gain in share price of the positions security from through the holding period	
Gain/Loss	Dollar gain or loss since opening the position	
Gain/Loss w Div	(Exit price * Total shares) – (Entry price * Quantity)	
Market Value	Value of position	
Purch Price	Position entry price	
Quantity	Number of shares or contracts	
Reinvestment Income	The total dollar amount paid in dividends through the holding period of the position only for positions not being	

	reinvested in shares.	
Return w Div	Percentage return on investment including dividend payments	
Shares Purchased w Div	The number of shares purchased with dividend proceeds through the holding period of the position.	
Today's % Change	The percentage change between the previous sessions's closing price and the current price.	
Today's Change	The dollar change between the previous sessions's closing per share price, and its current price.	
Total Dividends	The total dollar amount paid in dividends through the holding period of the position.	
Total Shares	Shares of the original position + any shares acquired through dividend reinvestment.	
Value at Position Close	The Value of the position when closed (or if it were to be closed at the present moment)	
% Change	Percentage price change for current session	
% Change Month	% Price change over a one month period.	
% Change Week	% Price change over a one week period.	
12Mo % Return	Percent difference between last night's close and the close 52 week's ago.	
12Mo %Tot Return	Percent difference between last night's close and the close 52 week's ago, plus any dividends received.	
12Mo Begin Pr	The closing price 52 weeks ago.	
12Mo Div Hist	All dividends paid in the last 52 weeks.	
12Mo Div Pd	Value of dividends paid per share over 12 month period.	
12Mo Prev Close	A security's 12 months prior closing price on the most recent previous business day	
1Mo %Ret Adj	% return over 1 month	
1Mo %Tot Ret Adj	% return over 1 month with the addition of any dividends paid out over 1 month.	
1Mo Cash Div Pd	Sum of dividends paid for 1 share over the past 1 month	
1Mo Spinoff	<input type="checkbox"/> Returns the following values of which are	

	<p>applied to return calculations based on a spinoff corporate action.</p> <ul style="list-style-type: none"> o S = The return has been zeroed out due to a spinoff o N = The return is zero for other reasons (likely, no price on one of the two dates) o Y = the return is present! 	
3Mo %Ret Adj	% return over 3 month	
3Mo %Tot Ret Adj	% return over 3 months with the addition of any dividends paid out over 3 months.	
3Mo Cash Div Pd	Sum of dividends paid for 1 share over the past 3 months	
3Mo Spinoff	<p>☐ Returns the following values of which are applied to return calculations based on a spinoff corporate action.</p> <ul style="list-style-type: none"> o S = The return has been zeroed out due to a spinoff o N = The return is zero for other reasons (likely, no price on one of the two dates) o Y = the return is present! 	
52Wk H Date	Date the maximum price was reached in the previous 52 weeks	Updated end of day for next day trading
52Wk High	Maximum price for the last 52 weeks	Updated end of day for next day trading
52Wk L Date	Date the minimum price was reached in the previous 52 weeks	Updated end of day for next day trading
52Wk Low	Minimum price for the last 52 weeks	Updated end of day for next day trading
6Mo %Ret Adj	% return over 6 months	
6Mo %Tot Ret Adj	% return over 6 months with the addition of any dividends paid out over 6 months.	

6Mo Cash Div Pd	Sum of dividends paid for 1 share over the past 6 months	
6Mo Spinoff	<ul style="list-style-type: none"> □ Returns the following values of which are applied to return calculations based on a spinoff corporate action. <ul style="list-style-type: none"> o S = The return has been zeroed out due to a spinoff o N = The return is zero for other reasons (likely, no price on one of the two dates) o Y = the return is present! 	
Annual Dividend	If regularly paid (ie, quarterly, monthly), this is the total dividends expected to be paid over the next 12 months. In some cases, the amount and timing of dividends are irregular, and therefore impossible to forecast - in those cases, we sum up dividends paid over the last 12 months.	
Annual Revenue	Annual Revenue in millions	
Ask	Ask price (lowest available selling price)	
Ask Exchange	Exchange of ask price	
Ask Size	Quantity available to sell at ask price	
Ask Yield	Current yield, based on ask price	Treasuries only
*Asset Class	Primary Sector: Equity, Fixed Income, Global Equity, Commodity or Currency.	
Average Volume	Average volume for previous 20 days	
Basecode	Determines the method of Price base code translation (1/10, 1/100, etc)	
*Benchmark	Benchmark Index tracked by ETF	
BETA	A measurement of the sensitivity of a company's stock price to the overall fluctuation in the S&P 500 (S&P 500), or for Canadian listings, the Toronto Stock Exchange 300 Index. For example, a beta of 1.5 indicates that a company's stock price tends to rise (or fall) 1.5 percent, with a 1 percent rise (or fall) in the index price.	
Bid	Bid price (highest available buying price)	
Bid Exchange	Exchange of bid price	

Bid Size	Quantity available to buy at bid price	
Bid Yield	Current yield, based on bid price	Treasuries only
Bid-Ask	The bid and ask price (side-by-side in same cell, eg, Watch List, Detailed Quote)	
Bid/Ask Size	The bid and ask's size (side-by-side in same cell, eg, Watch List, Detailed Quote)	
BlockTrade1	Number of trades between 1 and 49,999 shares	
BlockTrade2	Number of trades between 50,000 and 99,999 shares	
BlockTrade3	Number of trades over 100,000 shares	
BlockTradeTotalCount	Aggregate number of block trades	
BlockTradeTotalVol	Aggregate volume of block trades	
BlockTradeVolume1	Aggregate volume of shares traded in trades between 1 and 49,999 shares	
BlockTradeVolume2	Aggregate volume of shares traded in trades between 50,000 and 99,999 shares	
BlockTradeVolume3	Aggregate volume of shares traded over 100,000 shares	
Book Value	The book value of a company, in millions.	
Book Value Per Share	Common Equity / Common Shares Outstanding	
**BuyerID	The TSX assigned ID number for the broker on the buy-side of a trade	
Close	Futures: High of closing range	
Close2	Futures: Low of closing range for futures	
Comment	Allows users to enter brief notation in each row. To enter text, double-left-click on desired cell, enter text in "User Comment" dialog box.	
Contract Deliverable	Number of shares represented by an option contract	
Contract High	The High over the life of the Contract	
Contract High Date	The Date that the Contract High was set	
Contract High Volume	The # of contracts traded when the contract hit its high for the life of the contract	
Contract Low	The Low over the life of the Contract	
Contract Low Date	The Date that the Contract Low was set	

Contract Low Volume	The # of contracts traded when the contract hit its low for the life of the contract	
Coupon	Treasuries only (ie, GovPx & Cantor)	
Cumulative Volume	Futures: Electronic volume	
Currency Code	Currency the security trades in (eg, RIM-TC = CAD)	
Current Ratio	(TTM) - Total Current Assets / Total Current Liabilities, on a trailing 12-month basis	
Current Trading Date	It's the Date of the current trading session.	
CUSIP	The 9-character identifier for North American securities	
Date	Date of last update - can be trade or quote update	
Delivery	For futures only	
DeliveryDate	For futures only	
***Delta	The neutral hedge ratio, or the expected change in the option premium given a one point change in the price of the underlying Instrument (Measure of the options sensitivity to changes in the Underlying Instrument)	
Description	Equities, Indices, futures: Name. ETFs, ETNs & Mutual Funds: Issuer. Currency: Base Currency. Options: Underlying, Month, Strike, Type.	
Description2	For mutual funds, the name of the fund (ie, the "issue"). Equities with SEDOLs will display SEDOL	
Div, Date Annc	Date the dividend was announced	
Div, Pay Date	Date the dividend was/will be paid	
Div, Prev XDate	Date the dividend went ex-dividend	
Div, Rec Date	Date the dividend was announced	
Dividend	The dividend farthest out in the future - almost always the most recently paid or announced dividend. Confirm by referencing Research -> Corp Actions.	
Dividend Interval	Number of days between dividend payments	
Dividend Yield	Dividend Yield = (indicated annual dividend / current price) * 100	
DTE	Days to Expiration. For futures only.	
EBITDA (TTM)	(TTM) - EBITDA on a trailing 12-month basis	
EPS	Earnings per share (Total Earnings most recently reported divided by Outstanding Shares) Calculated daily.	

EPS, Exp NextQ	Estimated Amount of Upcoming Earnings	
EPS, Next FY	Estimated earnings per share for the fiscal year	
EPS, Next FYDT	Estimated date for the release of the fiscal year's earnings per share	
EPS, NextQDt	Estimated Announcement Date for Upcoming Quarterly Earnings	
EPS, PrevQ	Most Recently Reported Quarterly Earnings	
EPS, PrevQDt	Announcements Date of Most Recently Reported Quarterly Earnings	
Exchange	Exchange security is listed	
Expiration	Options and futures: Date of expiration.	
*Exp Ratio	Management Fee reported by Fund Sponsor	
ExtHours	Extended hours trade	
Ext Hours % Change	Ext Hours Percentage Change Value	
Ext Hours Net Change	Ext hours change Value	
Flags	Flags	
Float	Shares outstanding, less restricted shares	
***Gamma	Measure the expected change in Delta, given a one point change in the value of the underlying Instrument (Measures the stability of the options Delta)	
Headline Count	Number of headlines available	
High	Highest trading price for the current session	
***Implied Volatility	The volatility of the market as implied by a given option price and given underlying price.	
Industry	Equities: Industry (sub section of Sector)	
ISIN	International Securities Identification Number. A unique international code which identifies a securities issue.	
Issue Description	ETFs: Part of Instrument's name.	

Last News Update	Timestamp of the last news update	
Last	Last price the asset has traded	
Last Trade Time	Date and Time of Last Trade	
Last+Change	Combination of the Last and the Change between the Last traded price, and the previous session's close	
Last+Settle	Last settlement	
*Leverage	Leverage Ratio for leveraged products (2X = 200% = 2.0)	
Low	Lowest price traded in the current session	
Margin Code	Y = Marginable, N = Not marginable	
Market	The Average of the Bid & Ask. If Bid=0 it will be Ask. If Ask=0 it will be Bid. If neither are present than Market will equal Recent.	
Market Cap	Market capitalization - <i>outstanding</i> , non-diluted number of shares, multiplied by the current share price	
Maturity Date	Treasuries only (ie, GovPx & Cantor)	
Midpoint	Mid price between session's High and Low prices	
Minutes Delayed	Reports number of minutes a quote is delayed.	
Month Prev Close	The price as of the last workday of the previous month	
Mov Avg 150	The average trade price over the most recent 150 business days, U.S. holidays and weekends excluded	
Mov Avg 200	The average trade price over the most recent 200 business days, U.S. holidays and weekends excluded	
Mov Avg 50	The average trade price over the most recent 50 business days, U.S. holidays and weekends excluded	
MTD % Change	Percentage Change since the 1 st of the Current Month	
MTD Div Paid	The MTD dividend will be the sum of the cash dividends which have gone ex in the current month.	
MTD%RetAdj	Percentage change between current price and last price of previous month - $[(\text{current price} / \text{previous month's end price}) - 1] * 100$	
MTD%TotRetAdj	Percentage price change between current price and last price of previous month, plus any dividends received for that period $[(\text{current price} + \text{MTD cash dividends}) / \text{previous price}] * 100$	

Nav	Net asset value	
Net Change	Difference between the Last traded price, and the previous session's close	
NewSettlement	The last price paid, or the value of today's settlement, available at the end of the trading day and posted until all prices is cleared for the next day's trading. Settlement prices are used to determine both margin calls and invoice prices for deliveries.	
Old Set IV	Implied volatility of old settlement	
OldSettlement	Previous close	
Open	Opening price	
Open Interest	Options: Open interest	
Open2		Doesn't Return Data - Pending Removal
Option Type	For options only, either Put or Call	
Option Type (S/NS)	For options only, either Put or Call	
Payout Ratio	(TTM) - Common and Preferred Stock Dividends Paid / Net Income, on a trailing 12-month basis	
PE	Price per Share / Earnings per Share	
Previous	Last price the asset traded in the previous session	
Pre Net Change	Net change in price during pre-market hours	
Price to Book	(TTM) - Stock Price / (Total Assets – Intangible Assets and Liabilities), for the most recent reported quarter.	
Price to Sales	(TTM) - Stock Price / Revenue per Share, on a trailing 12-month basis	
Psi	Change in option price based on changes in dividend of underlying	
QTD Div Paid	The sum of the cash dividends which have gone ex in the current quarter.	
QTD%RetAdj	Percentage change between current price and last price of previous quarter - [(current price / previous quarter's end price) – 1] * 100	

QTD%TotRetAdj	Percentage price change between current price and last price of previous quarter, plus any dividends received for that period [(current price + QTD cash dividends) / previous price] * 100	
Qtr Prev Close	The price as of the last workday of the previous quarter	
Quick Ratio	(TTM) - (Total Cash and Short Term Investments + Accounts Receivables + Other Receivables) / Total Current Liabilities, on a trailing 12-month basis	
Recent	Last Trade or Settlement, whichever is more current.	
Return On Assets	(TTM) - (EBIT * 0.625) / ((Total Assets (t) + Total Assets (t-1)) / 2), on a trailing 12-month basis	
Return On Equity	(TTM) - Earnings From Continuing Operations / ((Total Equity (t) + Total Equity (t-1)) / 2), on a trailing 12-month basis	
***Rho	Measures the expected change in the option Premium, given a 1% change in the Domestic Interest Rate.	
Root	The root symbol for Options (MSQ = MSQ), Futures. The extension for non-US stocks (eg, -TC for RIM-TC)	
Sales	(TTM) – Total Revenue on a trailing 12-month basis	
Sector	Highest level of economic sectors (see industry)	
SEDOL	The Stock Exchange Daily Official List number, a code used by the London Stock Exchange to identify foreignstocks, especially those that aren't actively traded in the U.S. and don't have a CUSIP number.	
**SellerID	The TSX assigned ID number for the broker on the sell-side of a trade	
Settlement	Same values as Tick below. "Tick/Close/Settlement. Either + or - to representing the change from the previous Trade Price when instrument is currently trading and a "C" when the session is closed for Equities and Options and a "S" when Futures contracts are settled	
Shares	Number of outstanding shares	
Shares Outstanding	Issued shares of stock held by shareholders	

Short Int Mo % Chg	Compares short interest from two months. If the latest reported short interest is midmonth, it will be compared to the previous midmonth short interest. If the latest reported short interest is end-of-month, it will be compared to the previous end-of-month short interest. The month short interest percent is a percentage.	
Short Int Mo Chg	Compares short interest from two months. If the latest reported short interest is midmonth, it will be compared to the previous midmonth short interest. If the latest reported short interest is end-of-month, it will be compared to the previous end-of-month short interest. The month short interest change is an absolute value	
Short Int Ratio	Latest reported short interest divided by the shares outstanding	
Short Int YTD % Chg	The percent change between latest reported short interest and the last short interest reported the previous year.	
Short Int YTD Chg	The YTD short interest change is the absolute change between the latest reported short interest and the last short interest reported the previous year.	
Short Interest	Latest exchange reported short interest (mid-monthly periodicity)	
Short Volume	Short Volume is a daily value, derived from short sale activity occurring in the US markets. We currently support the composite volume occurring on Nasdaq and its Boston Stock Exchange for trades of NYSE and Nasdaq-listings.	
Split Date	Date of Split ("Ex-Date")	
Split Ratio	(TTM) – Total Current Assets / Total Current Liabilities, on a trailing 12-month basis	
Strike	Options: Strike price	
*Structure	ETF or ETN	
*Sub Asset	Secondary Sector within the Primary Sector (over 60 Possible Sectors)	
SV Date	Is an end of day value, so its date is always the previous	

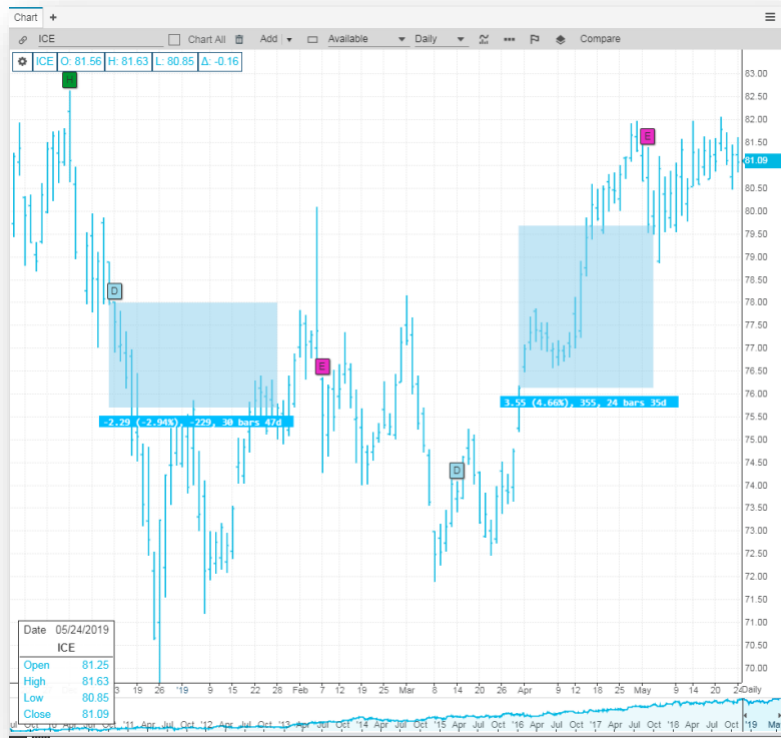
	trading session's date	
Symbol2		Doesn't Return Data - Pending Removal
***Theoretical Value	The value of an option as calculated by the option pricing model using the previous sessions closing implied volatility.	
***Theta	Reflects expected change in the option Premium, over one day (Measure of time value decay).	
Tick	Same values as Settlement above. "Tick/Close/Settlement. Either + or - to representing the change from the previous Trade Price when instrument is currently trading and a "C" when the session is closed for Equities and Options and a "S" when Futures contracts are settled	
Time	Time of the last update (Includes Bids / Asks)	
Total Debt to Equity	(TTM) – Total Debt / Total Equity on a trailing 12-month basis	
Trade Days	Futures. Number of days until contract expires.	
Trade Exchange	Exchange, market center, where last trade occurred	
Trade Size	Quantity of last trade	
*Type	Possible Types: Passive, Passive Quant, Active, Active Quant, Leveraged or Short	
Underlying symbol	Options: Complete symbol of the underlying asset (ie, MSQ = MSFT)	
***Vega	Measures the expected change in the option Premium, given a 1% change in the Implied Volatility of the option (Measures sensitivity to shifting volatility levels).	
Vol Avg 10D	The average volume over the most recent 10 business days, U.S. holidays and weekends excluded.	
Vol Avg 25D	The average volume over the most recent 25 business days, U.S. holidays and weekends excluded.	
Vol Avg 3Mo	The average volume over the most recent 90 business days, U.S. holidays and weekends excluded.	
Vol Avg 50D	The average volume over the most recent 50 business days, U.S. holidays and weekends excluded.	

Vol Avg MTD	The average month-to-date volume for the business days in the current month	
Volume	The total number of shares sold short from the exchanges currently supported	
VWAP	Volume weighted average price	
XDiv Date	The ex-dividend date of the most recently announced or paid dividend	
Yield	Indicated annual dividend divided by the last trade	
Yr. Prev Close	A security's prior closing price one year ago on the most recent previous business day	
YTD % Change	Percentage Change since Jan 1 of Current Year	
YTD Div Pd	Dividends paid per security for the year to date	
YTD%RetAdj	Percentage change between previous closing price and last price of previous year - $[(\text{current price} / \text{year-end price}) - 1] * 100$	
YTD%TotRetAdj	Percentage price change between previous closing price and last price of previous year, plus any dividends received for that period - $[(\text{current price} + \text{YTD cash dividends}) / \text{year-end price}] * 100$	

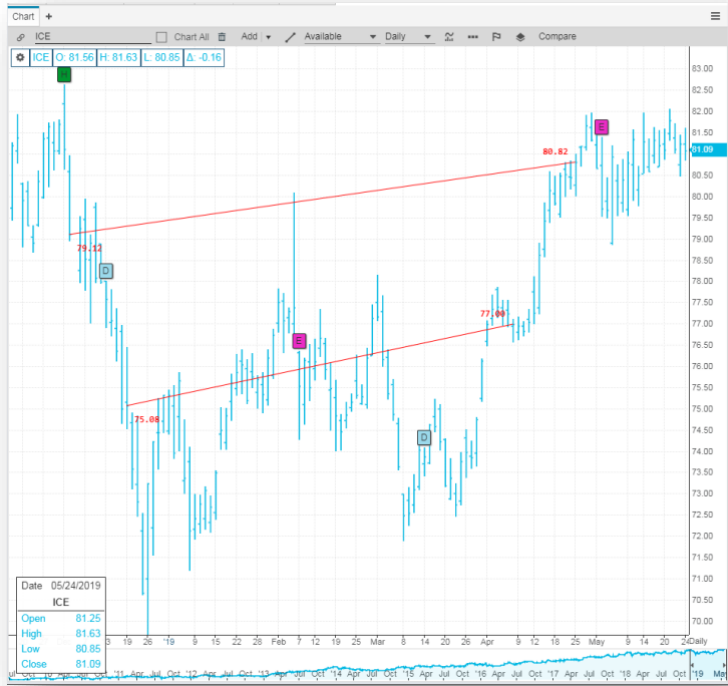
List of Drawing Tools:

Selection Tool: the default, it's a cursor for clicking on the chart for data

Measure Tool: measures the distance between 2 data points, the price, percent, dollar change (missing decimal point), number of bars and numbers of days difference will be calculated and displayed



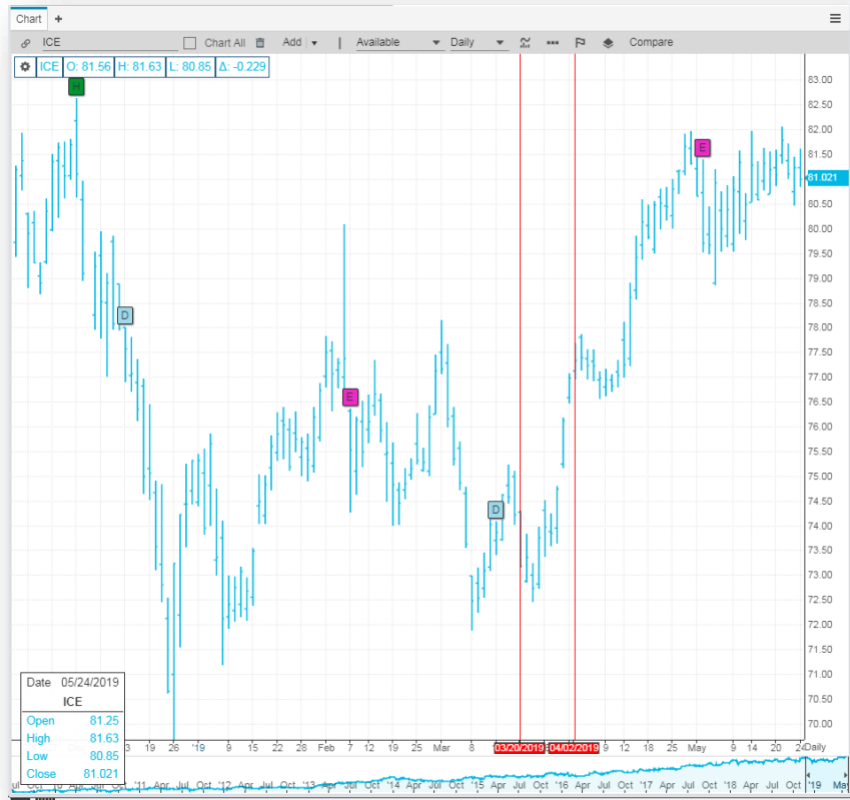
Line: Lines are used to mark the trends in which markets are moving.



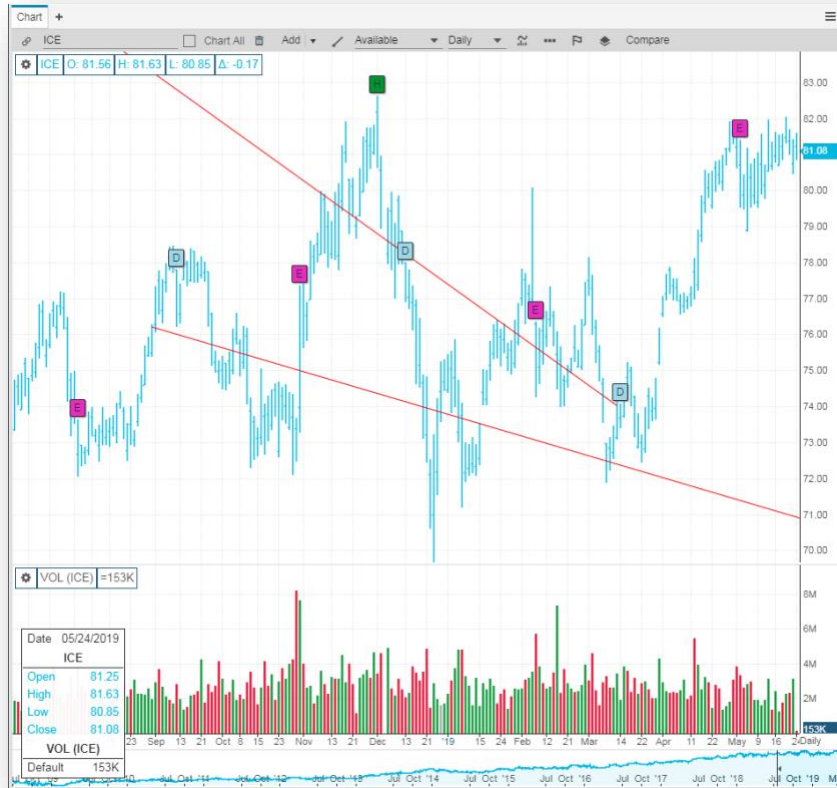
Level Line: Level Lines, as the name implies are absolutely flat and can be used to mark thresholds of price and other values.



Vertical Line: vertical lines can be used to mark thresholds of time



Ray: A ray is used to mark the trends in which markets are moving. The difference between a line and a ray is that a ray has two pivot points, and automatically extends indefinitely to the right.



Andrew's Pitchfork: Andrew's Pitchfork is a technical indicator that uses three parallel trend lines to identify possible levels of support and resistance as well as potential breakout and breakdown levels. The indicator, developed by Alan Andrews, uses trend lines that are created by selecting three points at the start of confirmed trends, higher or lower. This is achieved by placing the points at three consecutive peaks and troughs. Once the points are in place, a straight line that denotes the "median line" is drawn from the first point through the midpoint between the upper and lower points. Upper and lower trend lines are then drawn parallel to the median line



Channel

Text: allows for text box to appear wherever you click on the Chart



Up Arrow Callout: a up arrow icon you can place on the Chart by left clicking



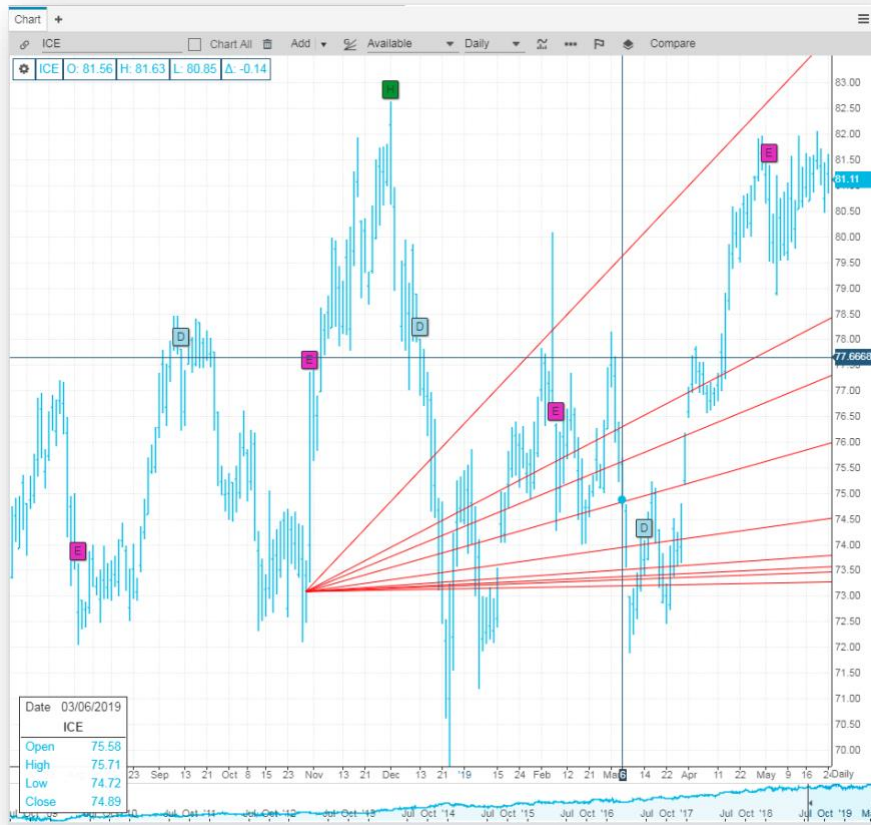
Down Arrow Callout: a down arrow icon you can place on the Chart by left clicking



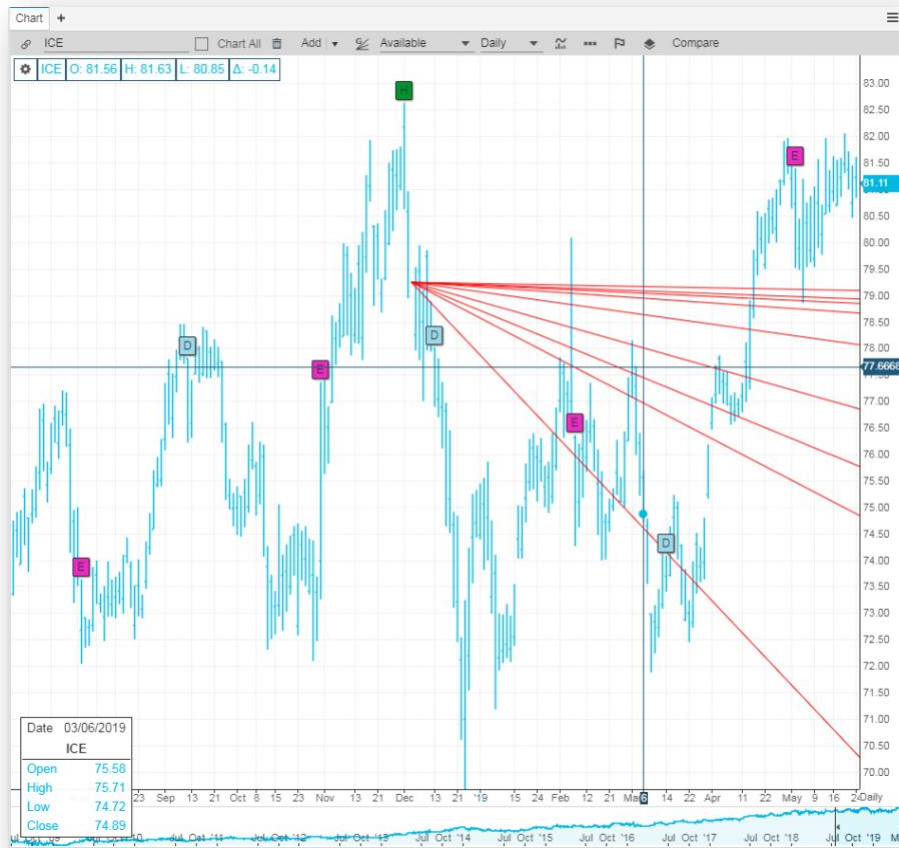
Gann Fan: A Gann Fan is drawn between a significant bottom and top (or vice versa) at various angles.



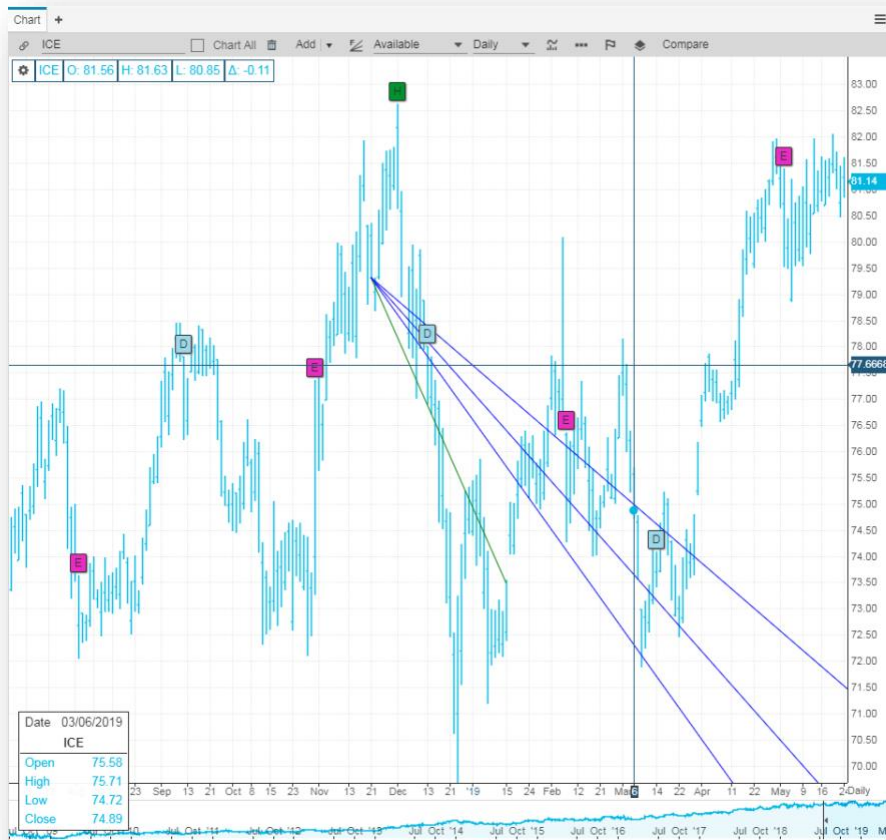
Up Gann Fan: A Gann Fan is drawn between a significant bottom and top (or vice versa) at upward angles.



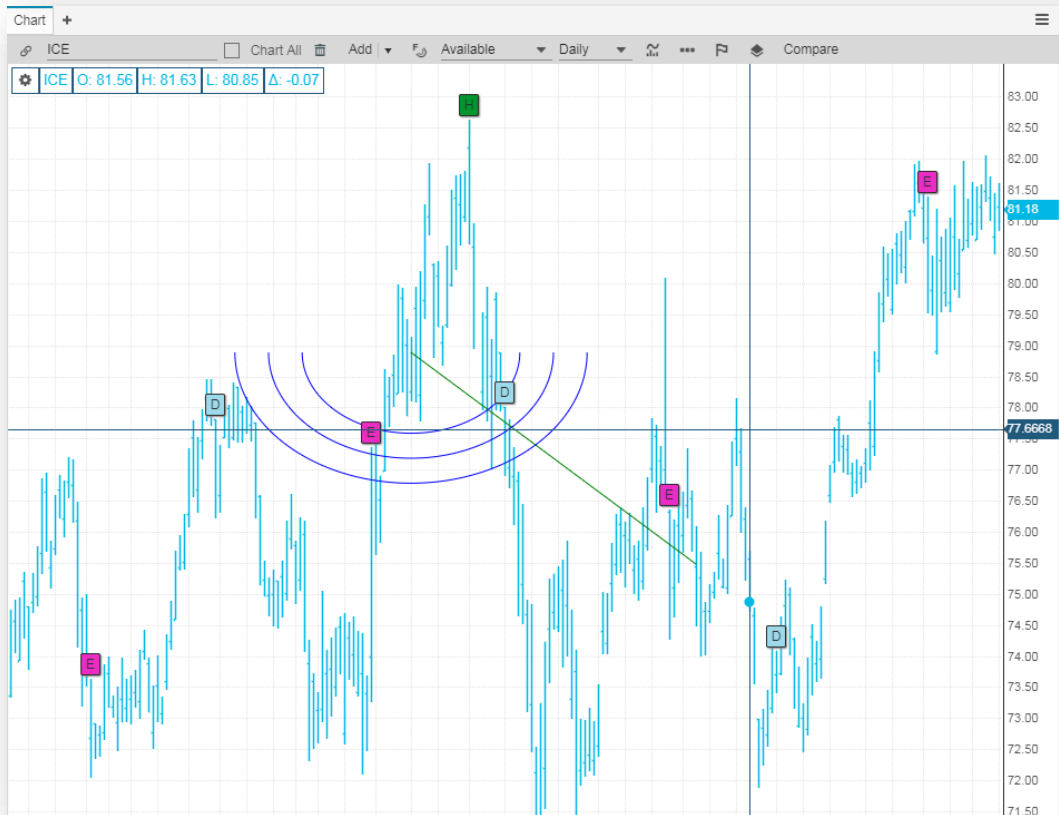
Down Gann Fan: A Gann Fan is drawn between a significant bottom and top (or vice versa) at downward angles.



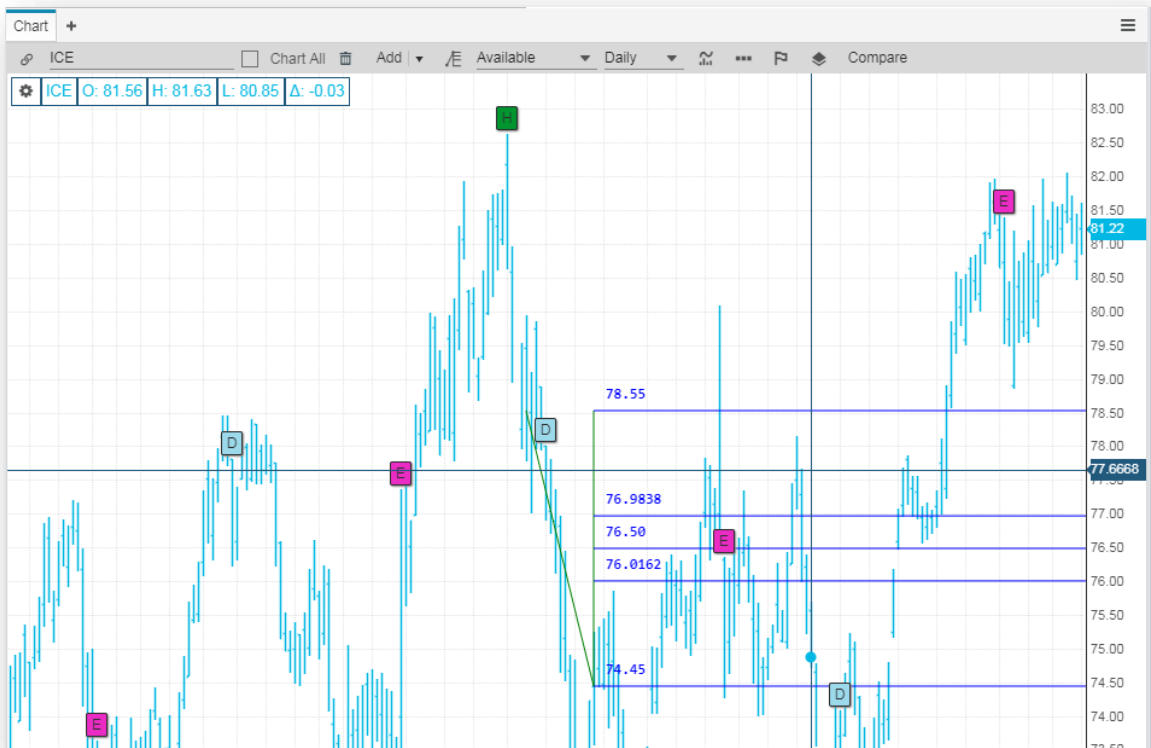
Fibonacci Fan: Fibonacci Fan is displayed by drawing a trendline between two reference or extreme points on the chart (usually a trough and opposing peak). Next, an invisible vertical line is drawn through the second reference point. Three trendlines are then drawn from the first extreme point so they pass through the invisible vertical line at the Fibonacci levels of 38.2%, 50.0%, and 61.8%.



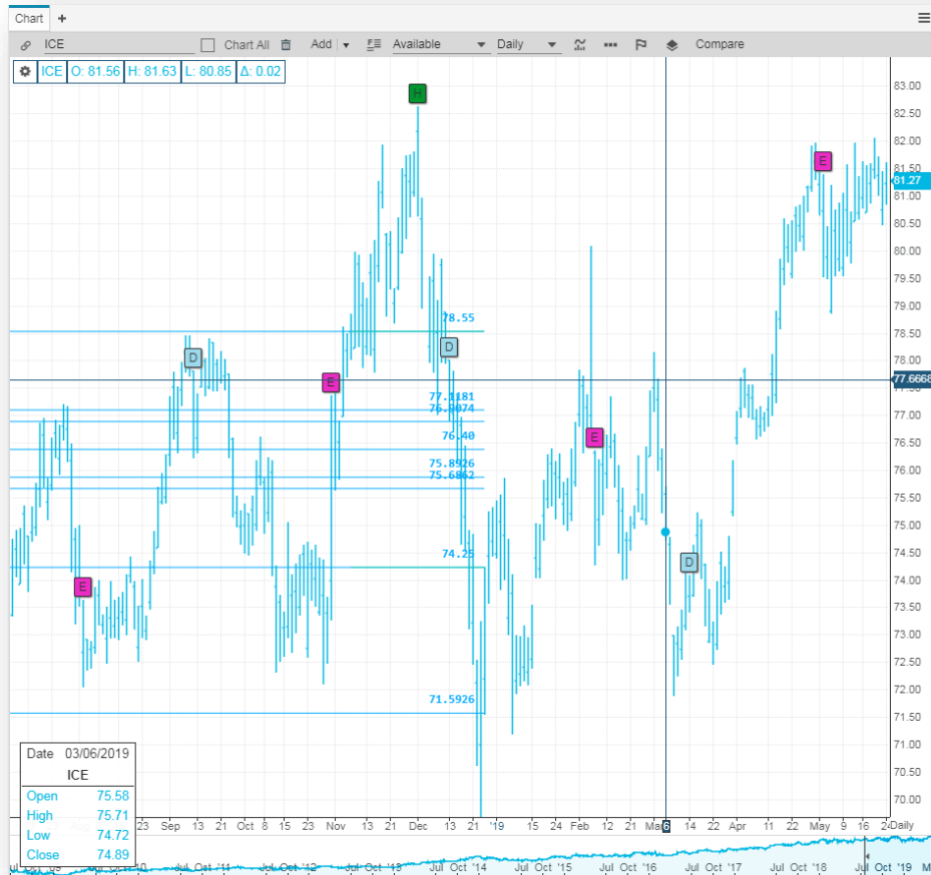
Fibonacci Arc: The Fibonacci Arc is drawn by placing a trendline between two extreme points (usually a trough and opposing peak). The radius of the arcs can be increased by pulling the control line End Point (Ending Price x time) away from the Beginning Point (Beginning Price x time).



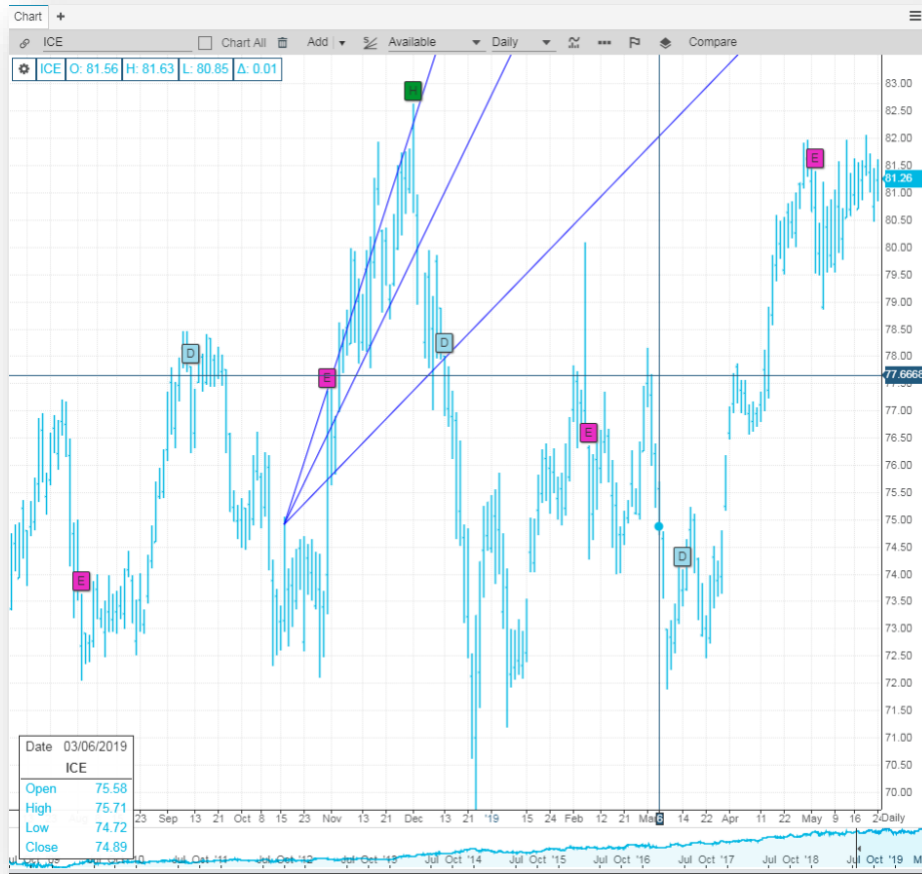
Fibonacci Retracement: Fibonacci Retracements are displayed by drawing a trendline between two reference or extreme points on the chart (usually a trough and opposing peak). Next, a series of nine horizontal lines are drawn. The lines intersect the trendline between the two reference points at the Fibonacci levels of 0.0%, 23.6%, 38.2%, 50.0%, 61.8%, 100.0%, 161.8%, 261.8%, and 4236%. Some of the lines might not be visible, because of the scale limitations in the chart window.



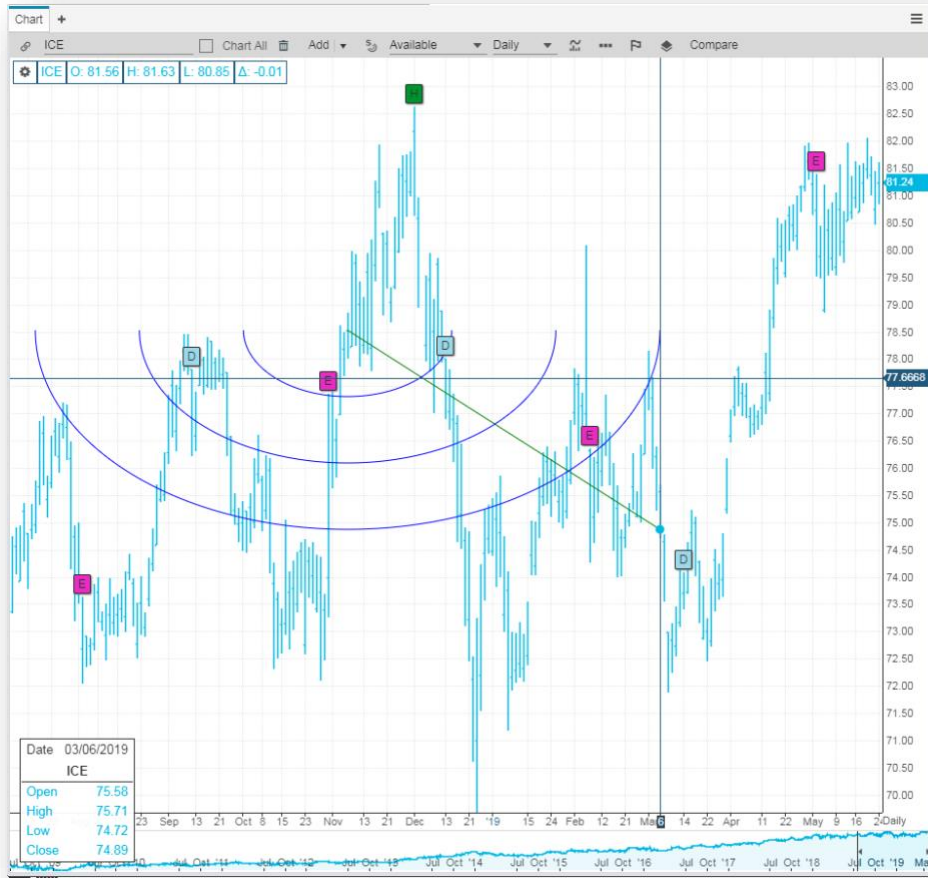
Fibonacci Extension: Fibonacci Extensions are similar to Retracements, except that they extend clear to one side of the chart of the chart and beyond. As with many of the other Fibonacci Tools a green control line is used to set the location, height and width of the Extension.



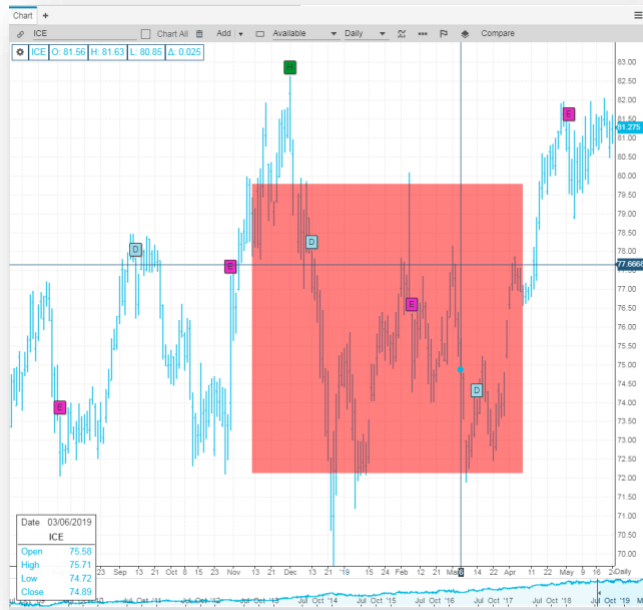
Speed Resistance Fan: The Speed Resistance Fan displays three trendlines, sometimes referred to as 1/3-2/3 lines. These trendlines divide a price move into three equal sections.



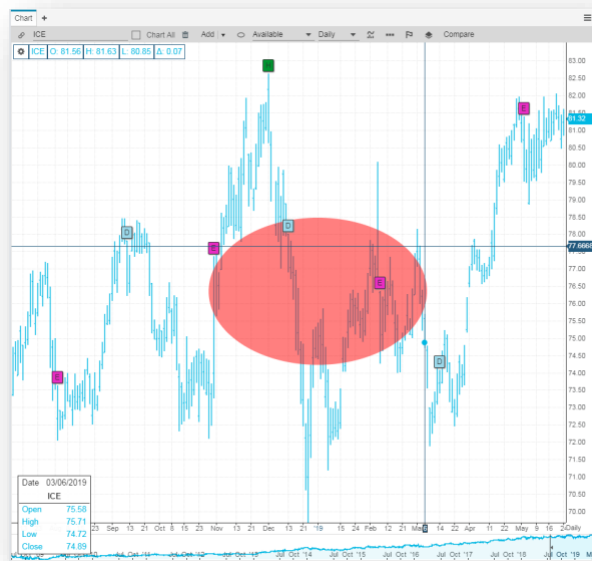
Speed Resistance Arc: he Speed Resistance Arc display three arcs, sometimes referred to as 1/3-2/3 arcs. These arcs divide a price move into three equal sections.



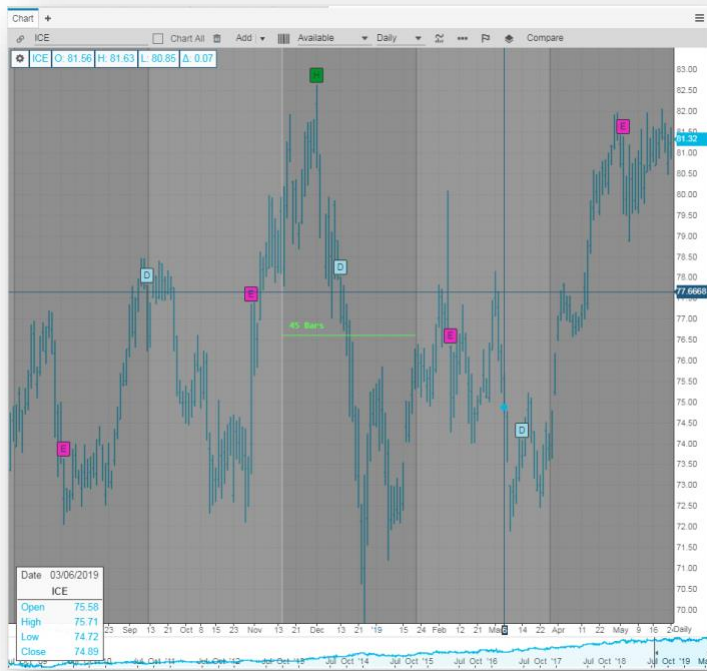
Rectangle: The rectangle is a non-analytical drawing object used to highlight or bring attention to a group of bars or a particular section in a chart.



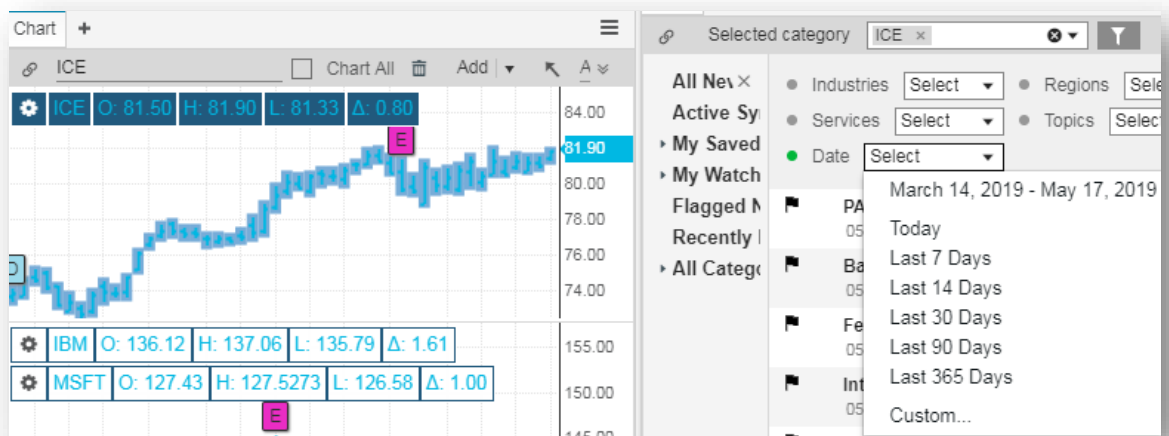
Ellipse: The ellipse is a non-analytical drawing object used to highlight or bring attention to a group of bars or a particular section in a chart.



Cycle Tool: The Cycle tool allows the user to specify a period of bars and then strips the chart so that patterns can be discerned

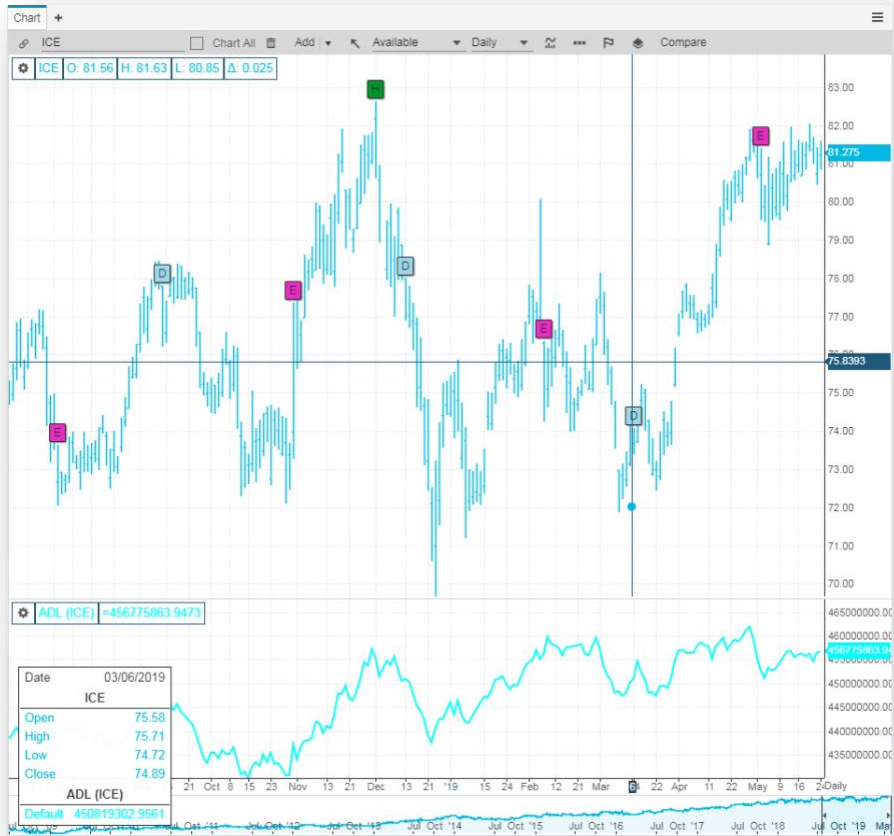


Show in News: allows you to highlight a timeframe of your symbol and view in the News widget with stories filtered to the timeframe you'd highlight on the Chart widget

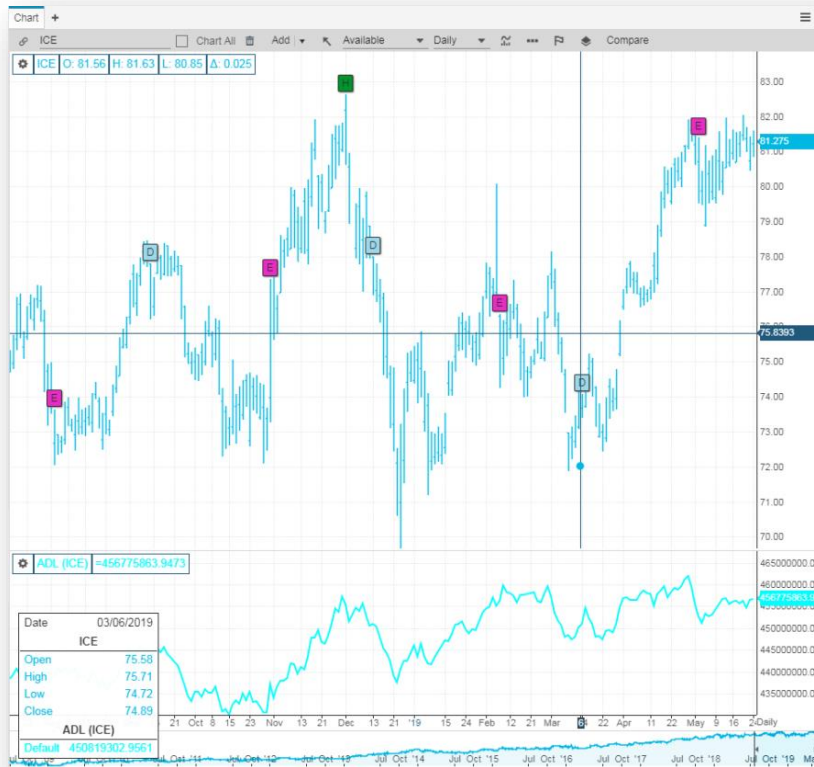


List of Studies:

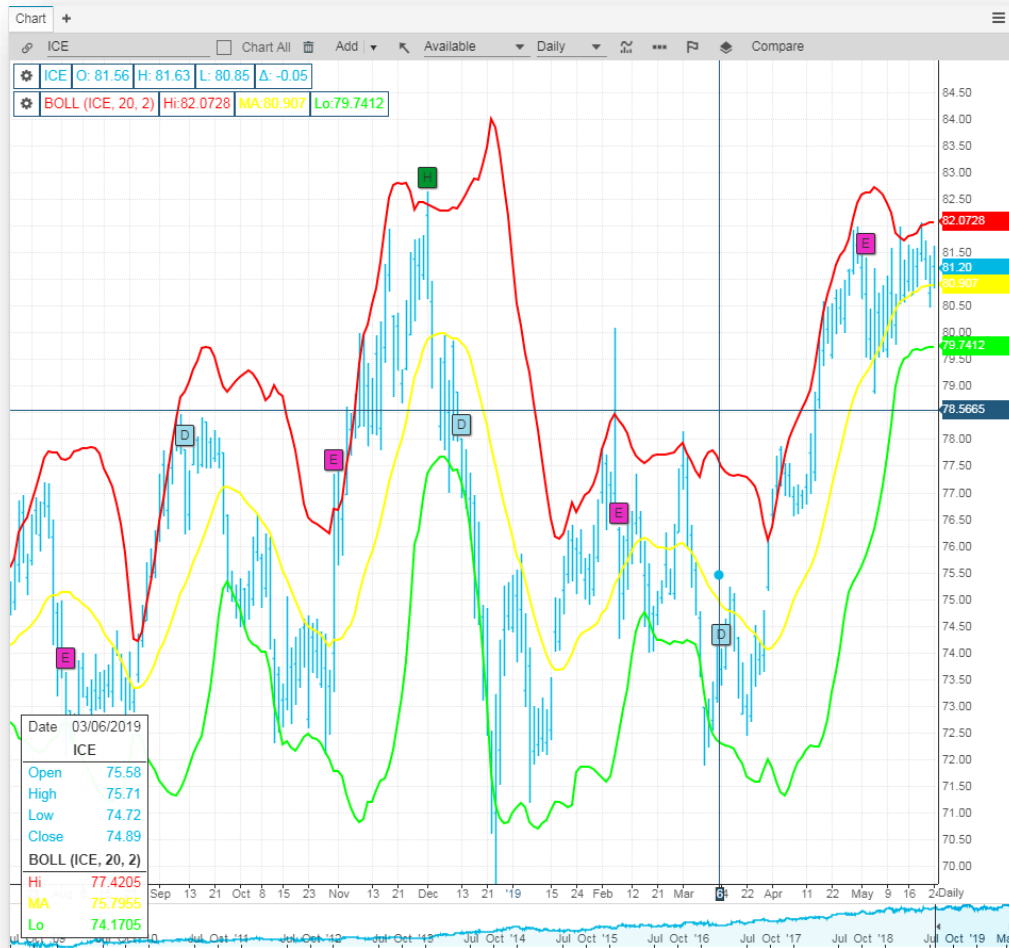
Accumulation/Distribution Line: a technical indicator that plots changes in the value of the advance-decline index over a certain time period. Each point on the chart is calculated by taking the difference between the number of advancing/declining issues and adding the results to the previous period's value



Average True Range: specifies the degree of price volatility of a security. The average true range is an n-day exponential moving average of the true range values



Bollinger Bands: Bollinger Bands is a technical analysis tool invented by John Bollinger in the 1980s, and a term trademarked by him in 2011. Evolving from the concept of trading bands, Bollinger bands and the related indicators %b and bandwidth can be used to measure the ‘highness’ or ‘lowness’ of the price relative to previous trades. Bollinger bands are an indicator of volatility.



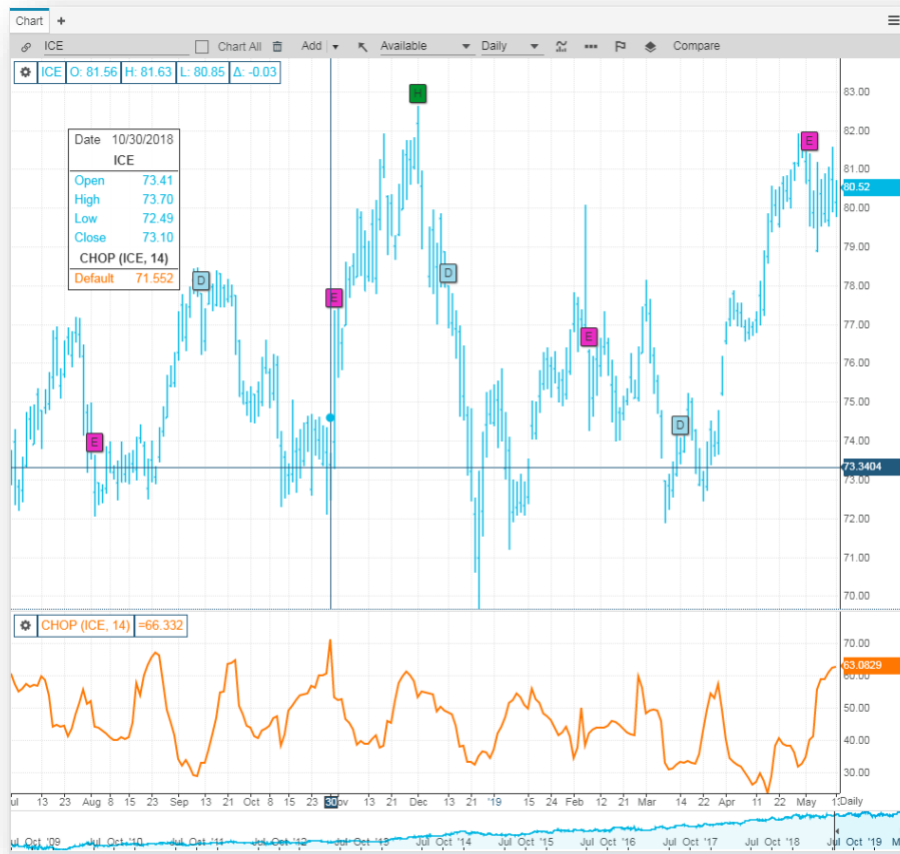
Chaikin Volatility: compares the spread between a securities’s high and low prices, quantifying volatility as a widening of the range between the high and the low price.

- High values indicate that intraday prices have a wide high-to-low range. Low values indicate that intraday prices have relatively constant high-to-low range

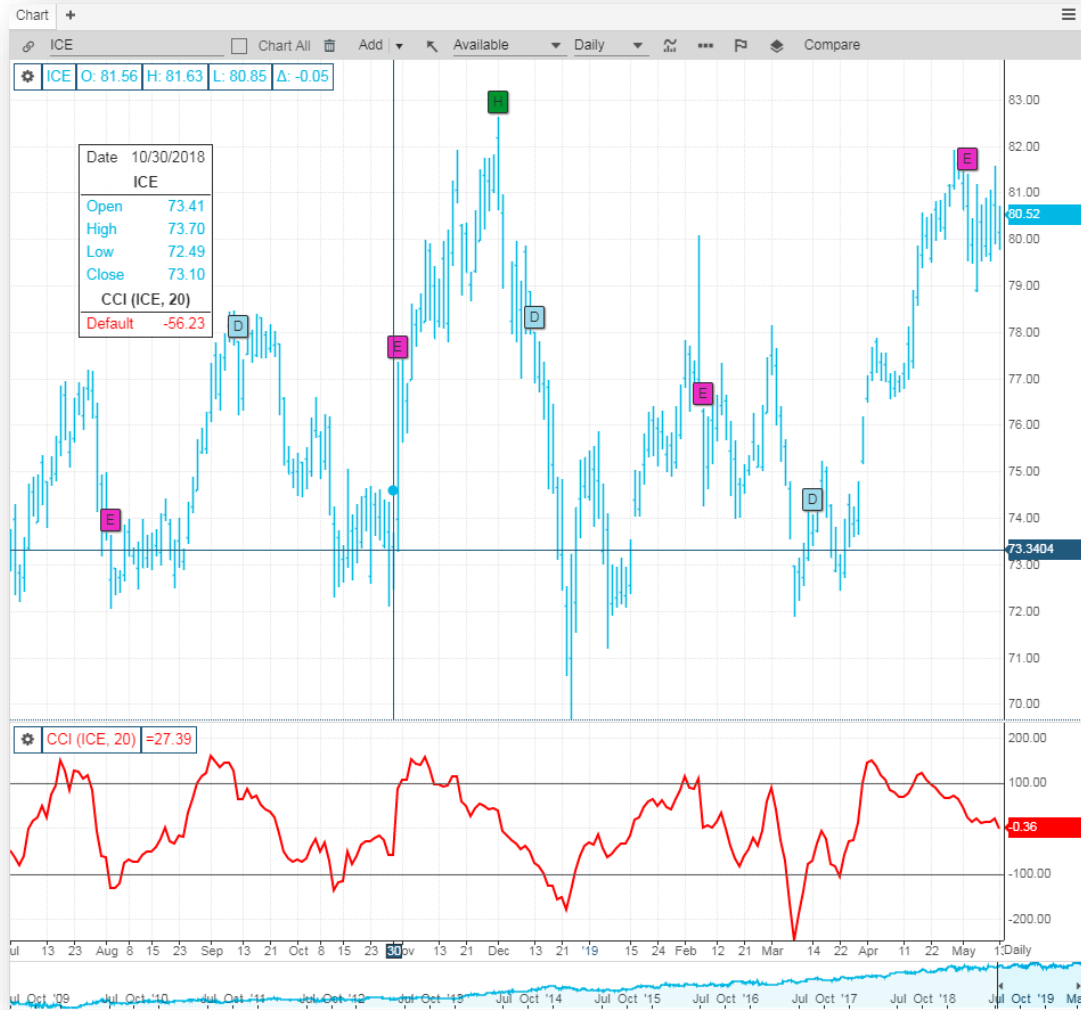
- Market tops that are accompanied by increased volatility over short periods of time indicate nervous and indecisive traders. Market tops with decreasing volatility over long timeframes indicate maturing bull markets
- Market bottoms that are accompanied by decreased volatility over long periods of time indicated bored and disinterested traders. Market bottoms with increasing volatility over relatively short time periods indicate panic sell-offs.



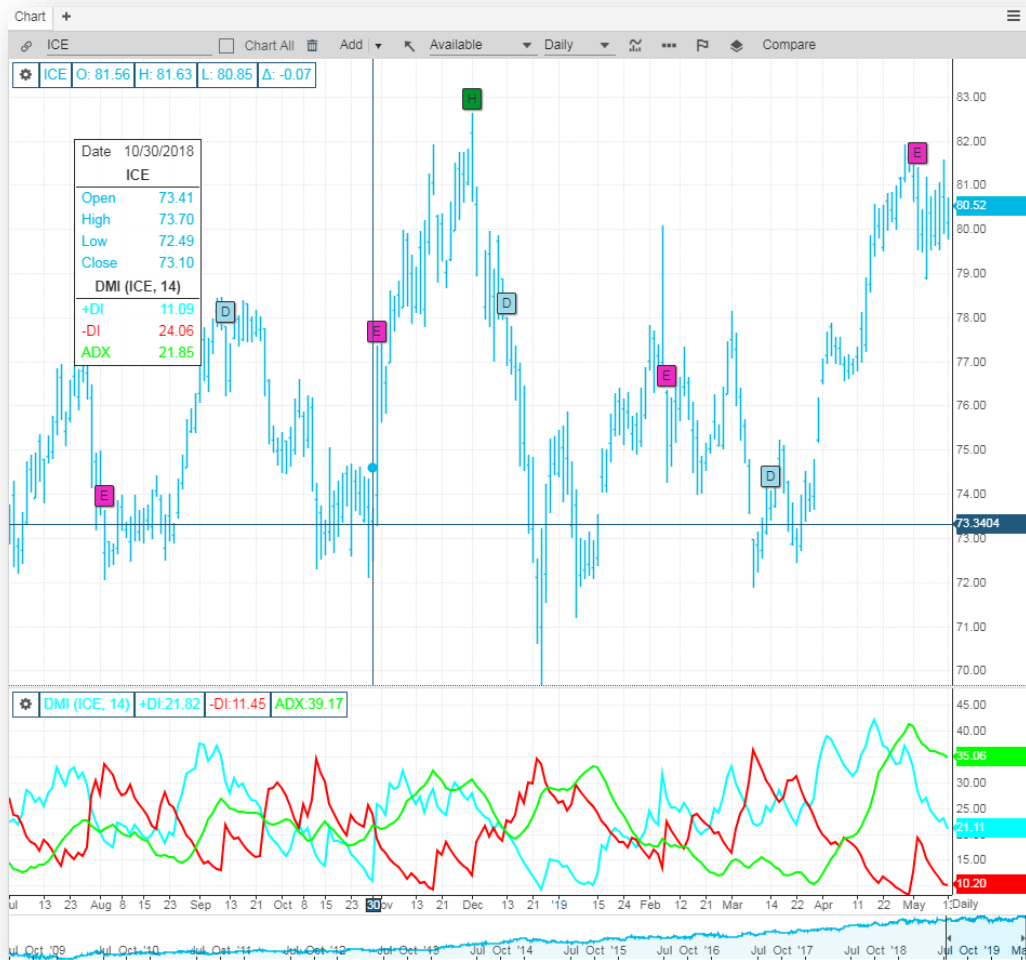
Choppiness: a function of market direction. A market that is trending has a low choppiness number while a trend less market has a high choppiness number



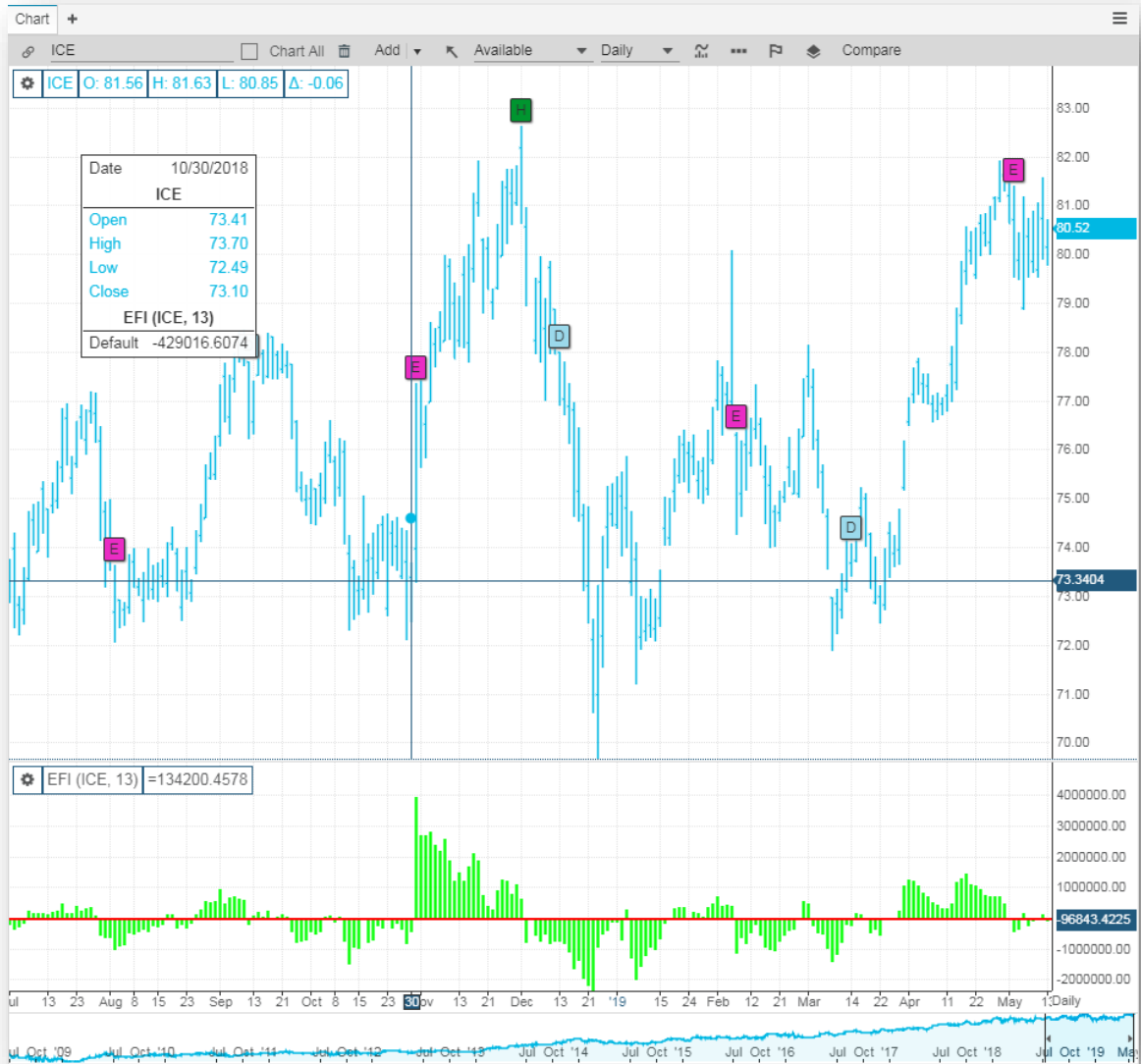
Commodity Channel Index: designed to detect beginning and ending market trends. This study measures the distance between the share prices and their moving average, and thus allows a measurement for the trend strength and/or intensity



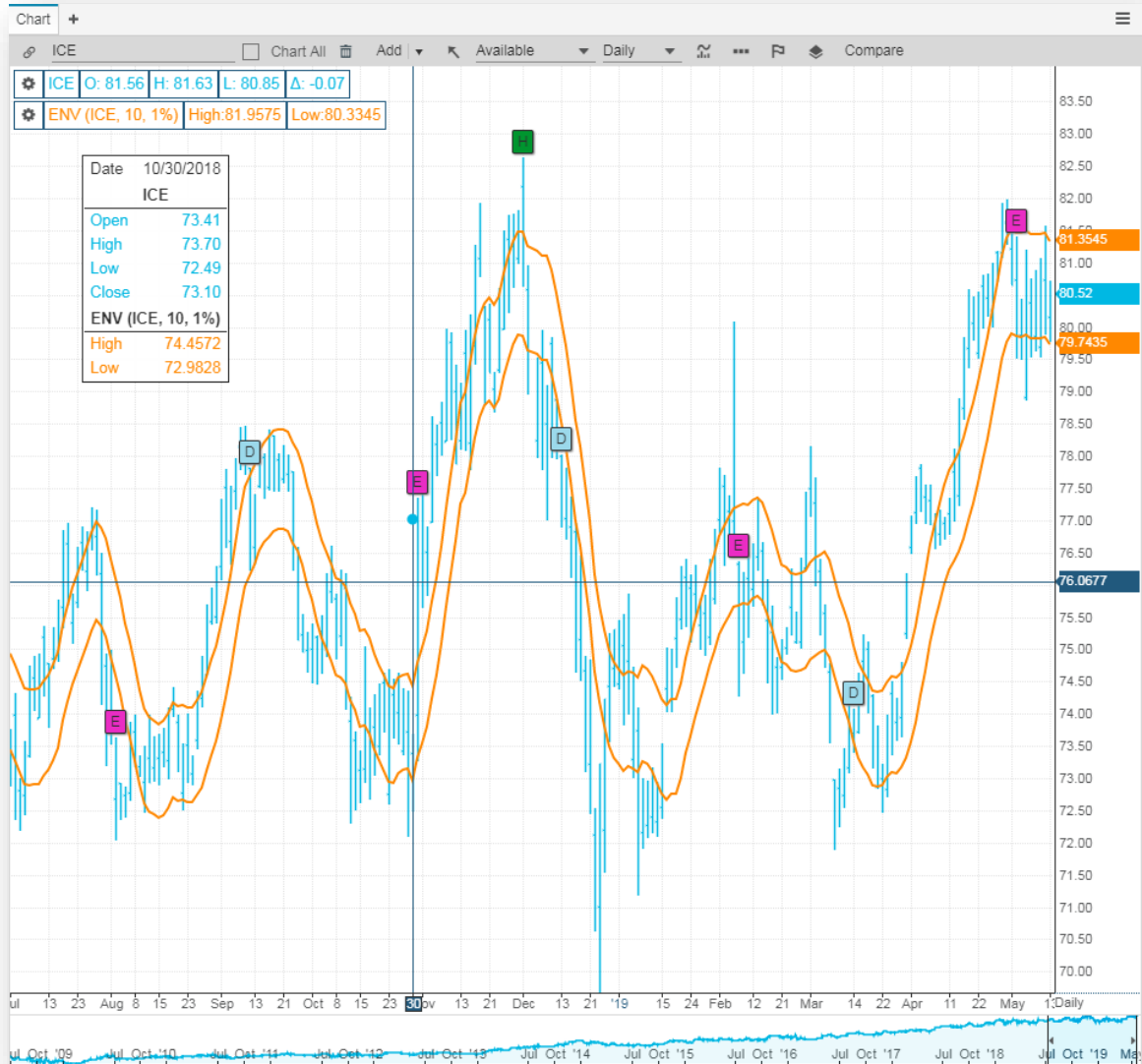
Directional Movement Index: plotted as three lines on a scale of 0 to 100. This scale is a measure of market trend. The two lines of DMI show the amount of positive and negative movement. The positive line is called D+ and the negative D-. The third line is based on the average directional index (ADX).



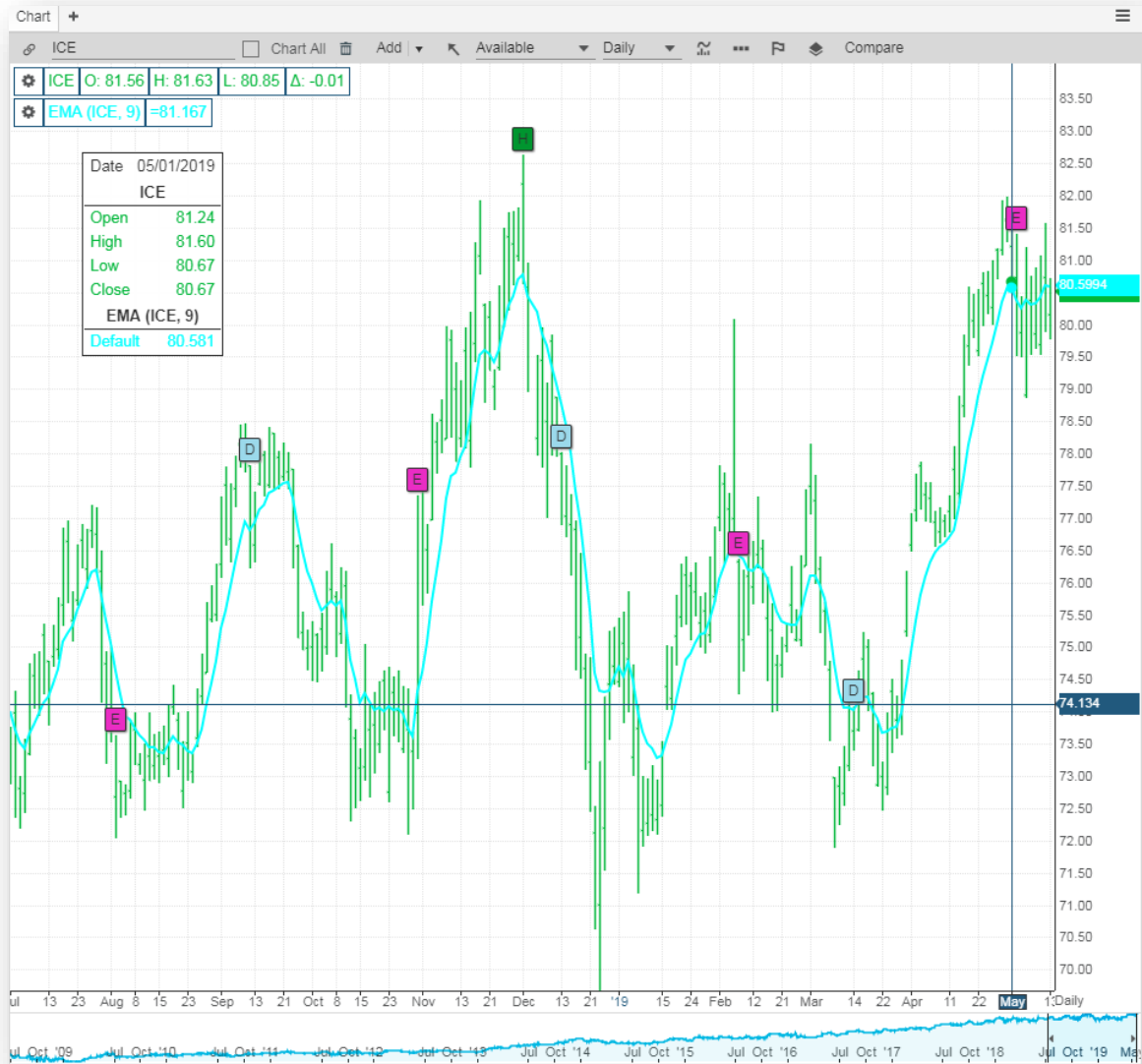
Elder Force Index: the force index is an indicator that uses price and volume to assess the power behind a move or identify possible turning points.



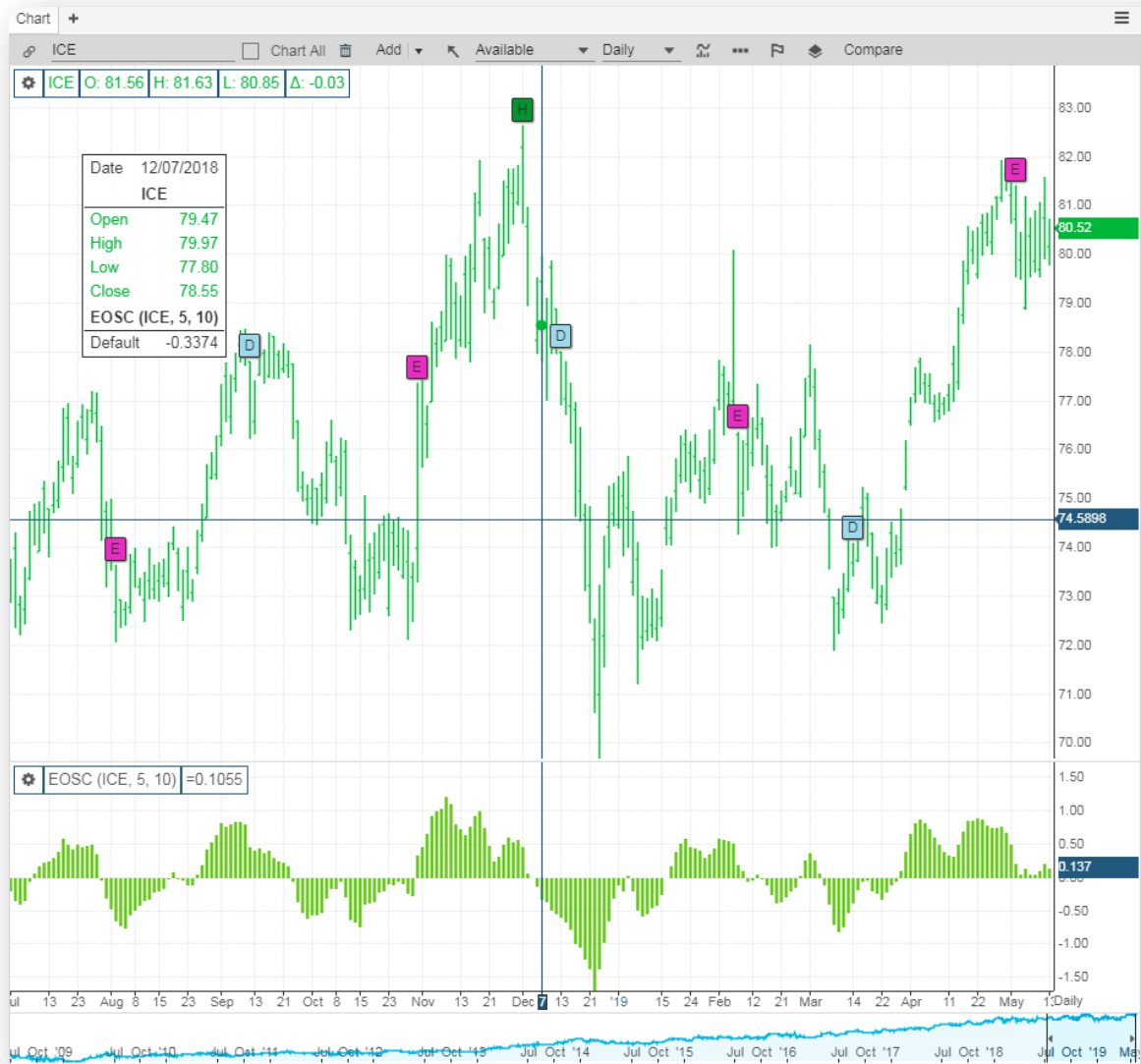
Envelope: a derivative of the moving average study. The price band has two lines that are equal percentage distance from the simple moving average. The moving average line is not visible.



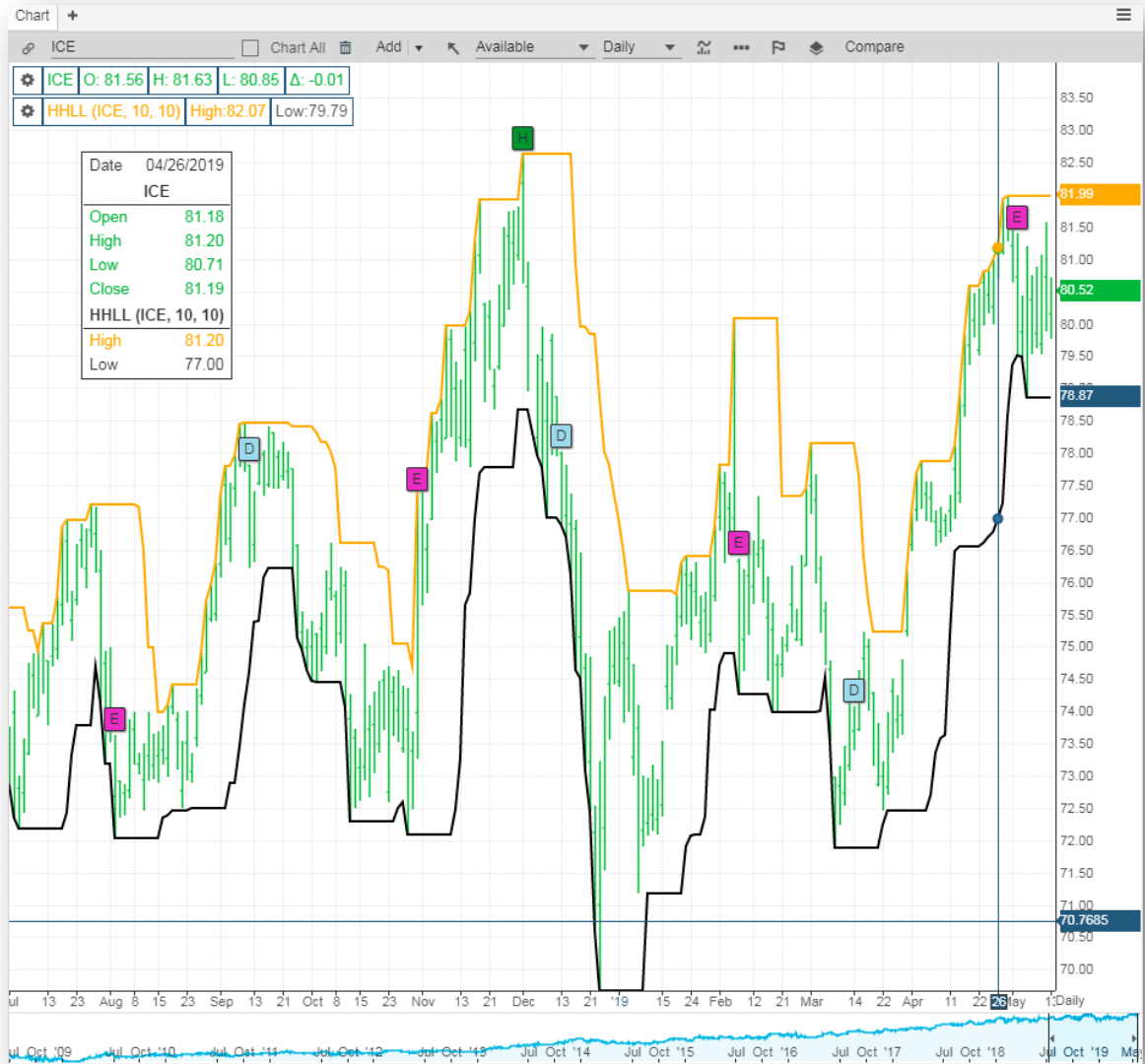
Exponential Moving Average: similar to the simple moving average except a weighting is applied to the price data as the average is calculated thus removing short-term fluctuations and leaves to view the prevailing trend.



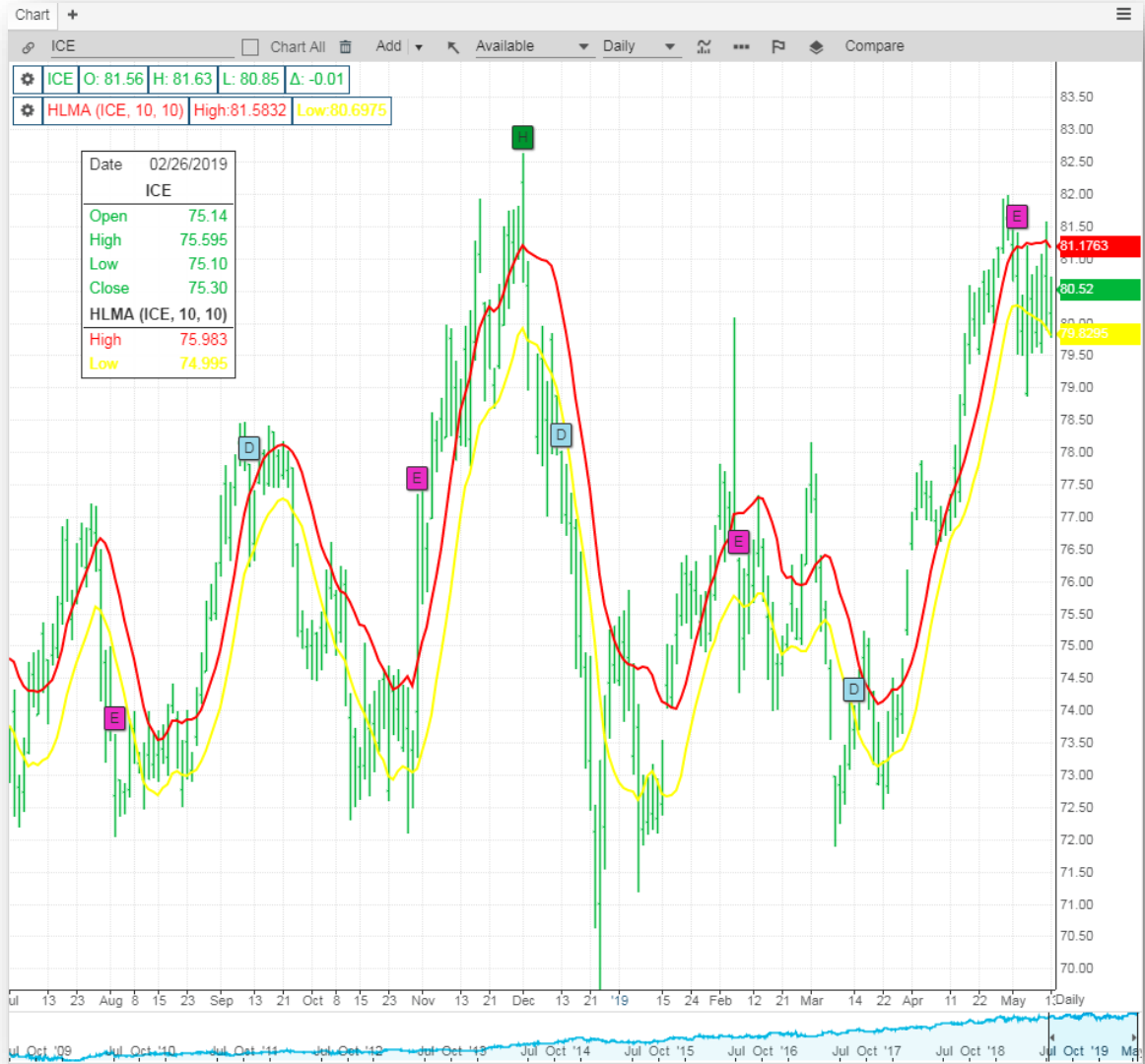
Exponential Oscillator: a histogram, using the difference between two moving averages. Used to help identify divergences, short-term variations from the long-term trend, and to identify the crossing of two moving averages, which occur when the oscillator crosses the zero line.



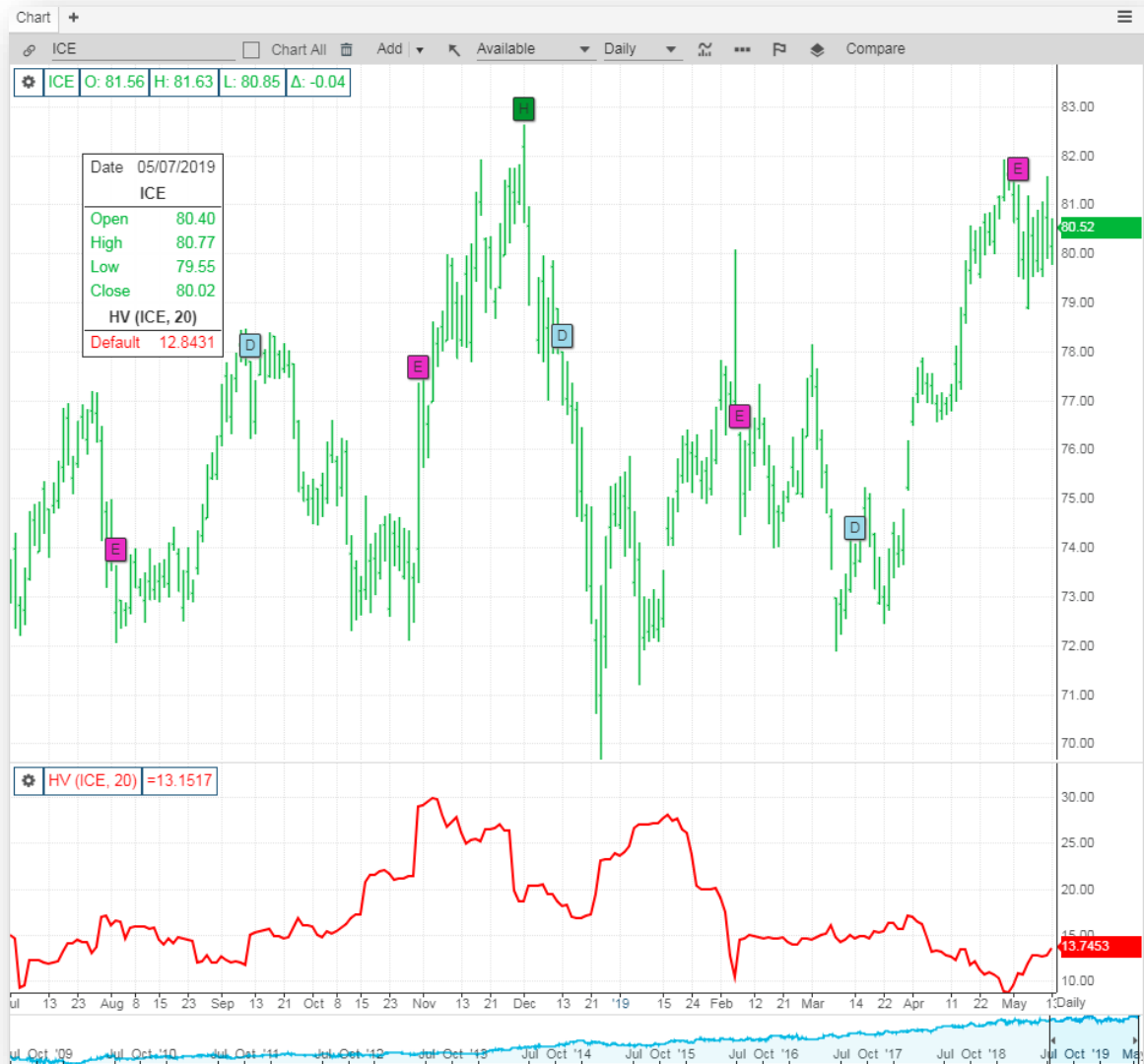
Highest High Lowest Low: an envelope of values by using the highest high or the lowest low of the last n periods.



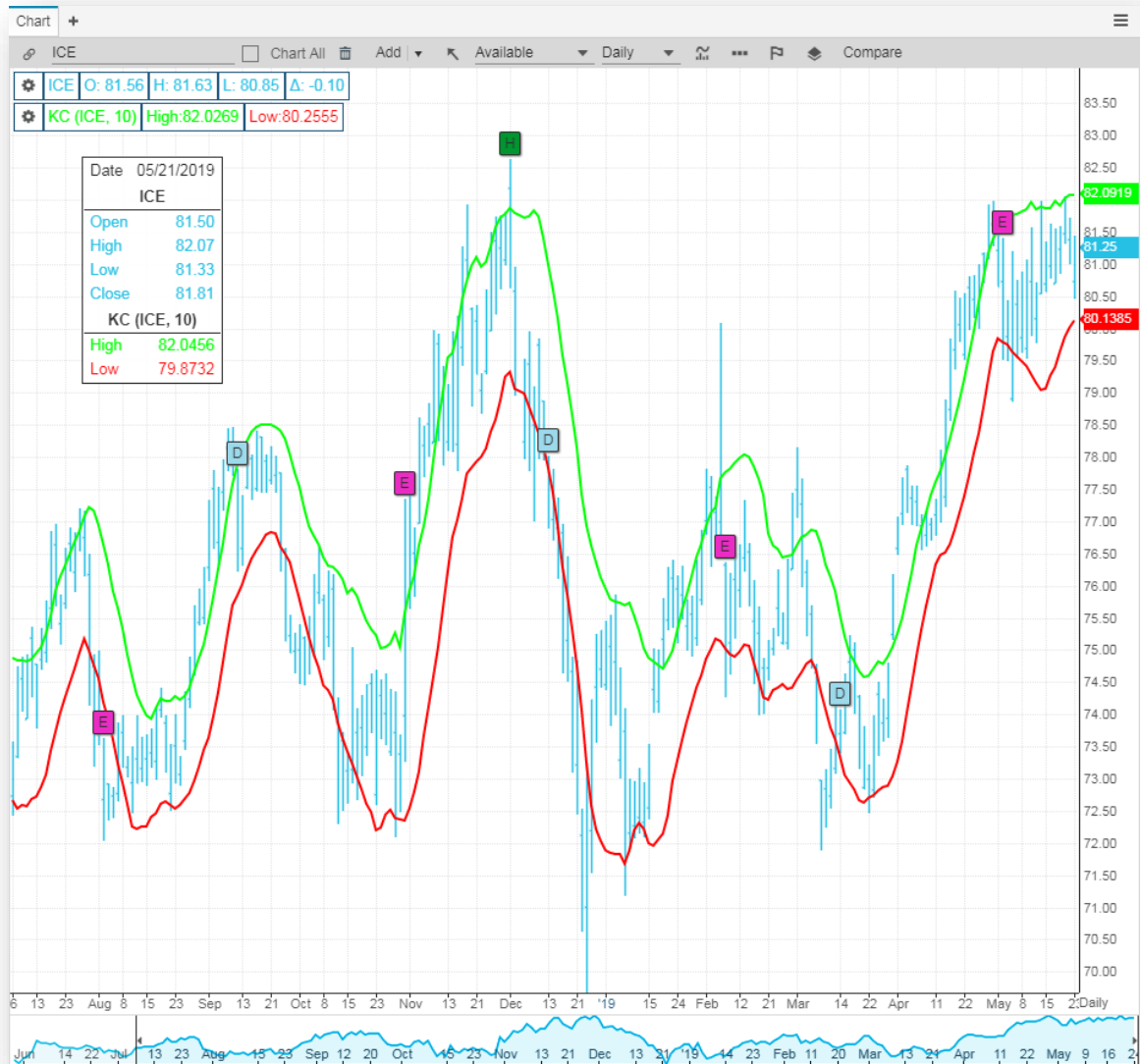
High Low Moving Average: a simple moving average of the high and low for the specified interval. The length of the moving average can vary for the high and low.



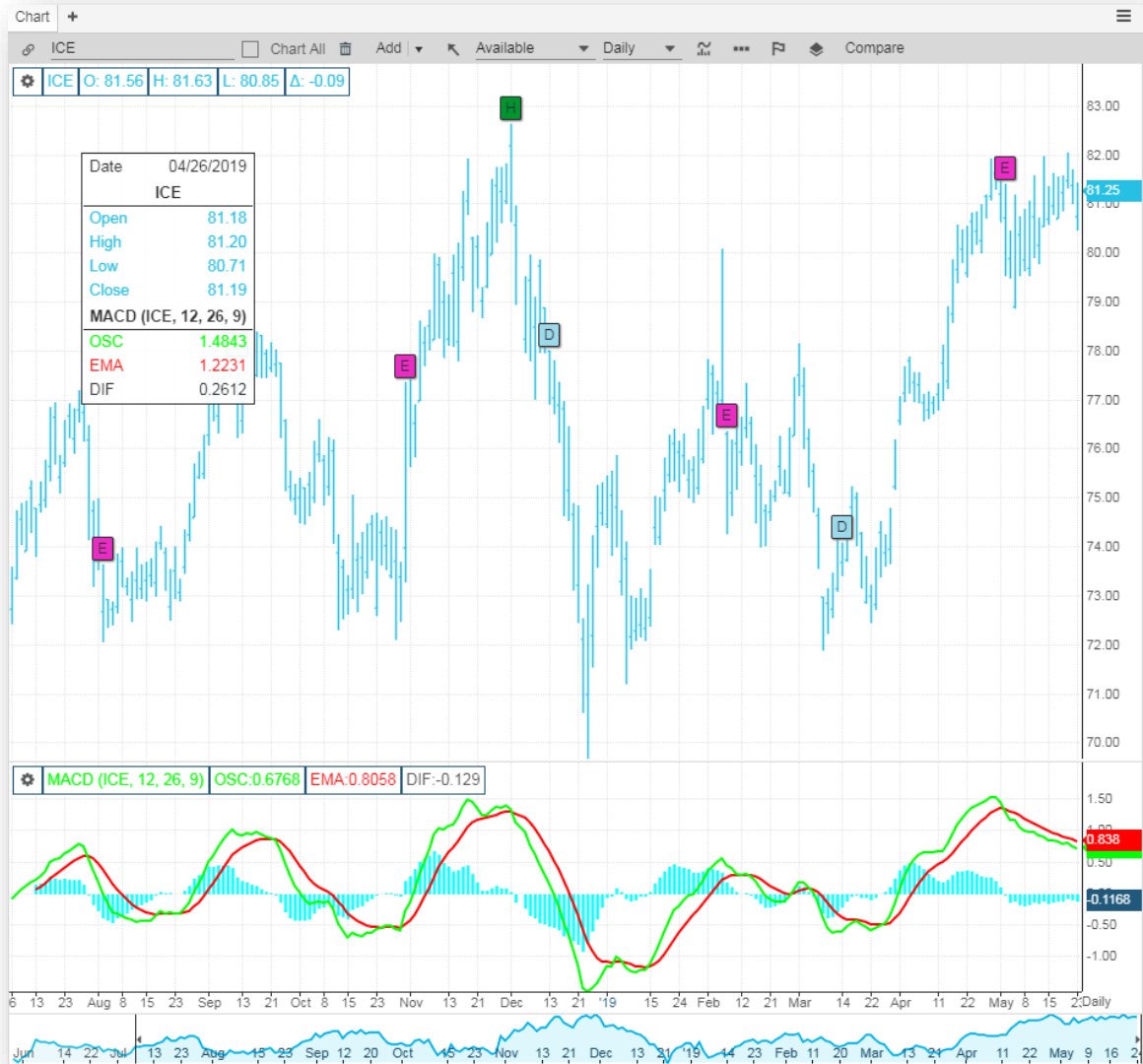
Historic Volatility: the degree of movement in a market for a given period over a specified time span.



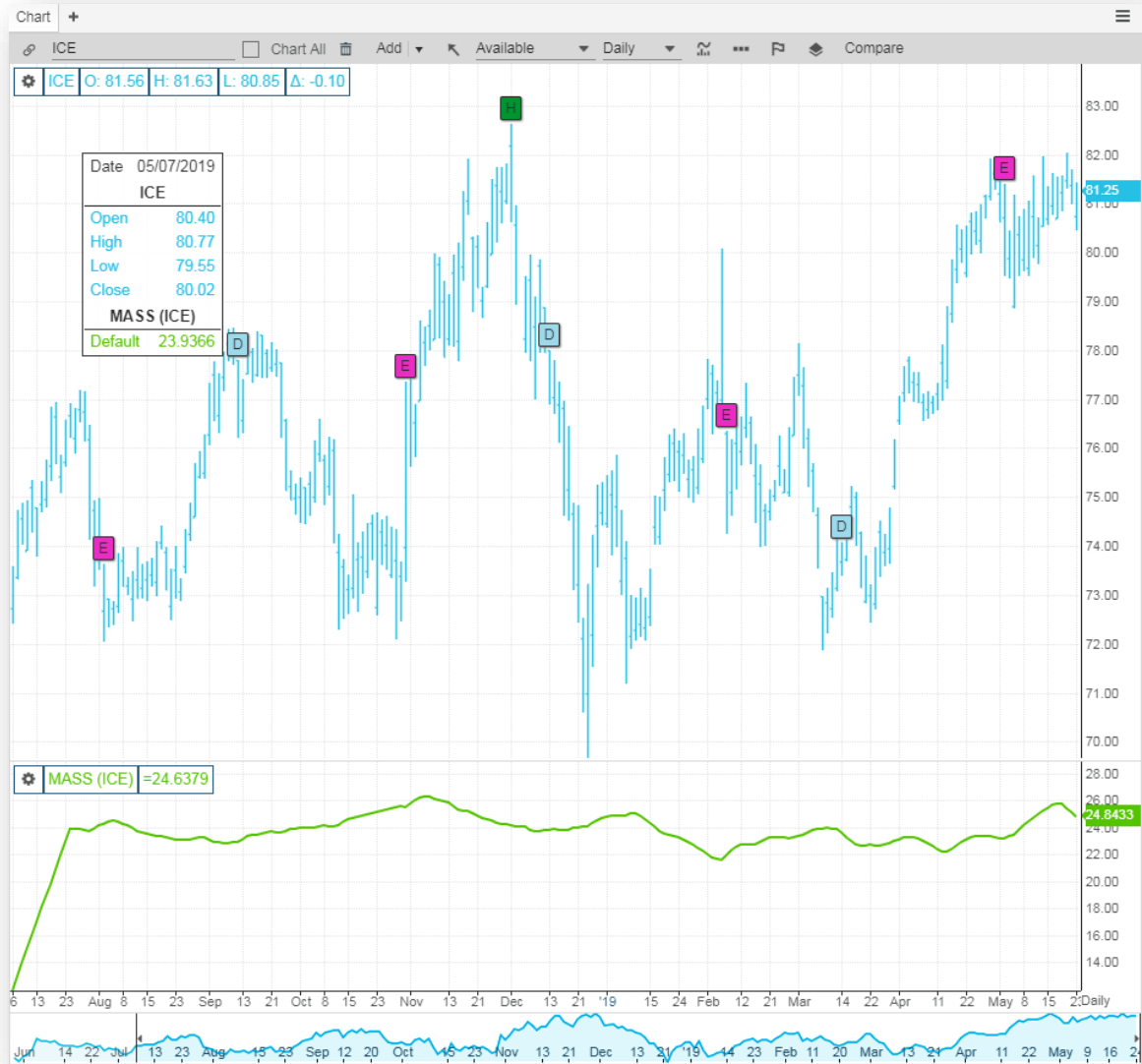
Keitner Channel: an n-day moving average plotted with a channel formed by adding and subtracting an n-bar moving average of the high-low range to or from the moving average. The width of the channel adjusts to market volatility.



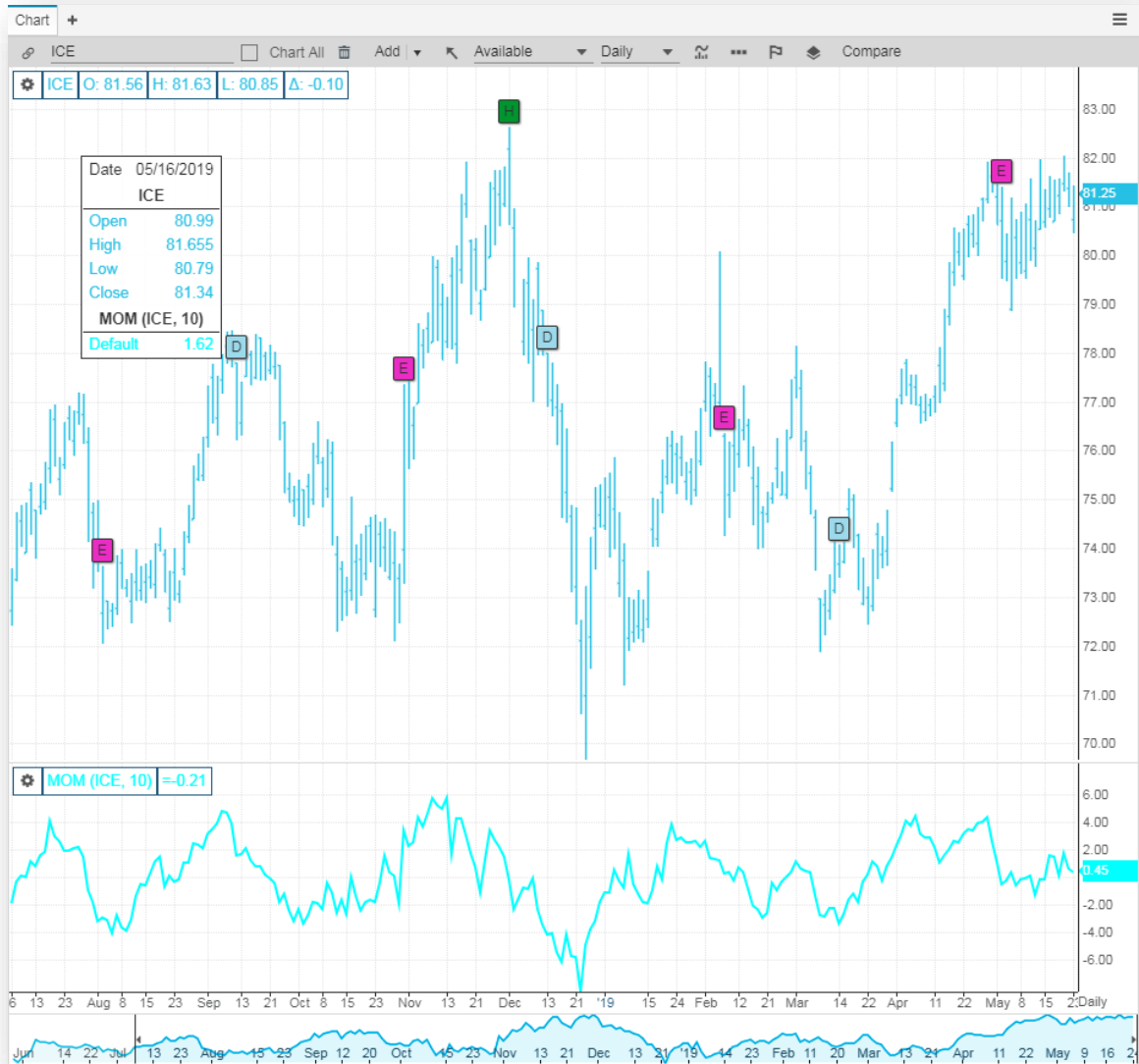
MACD: calculates moving averages that can monitor and signal trends. It is both a trend following indicator as well as an oscillator.



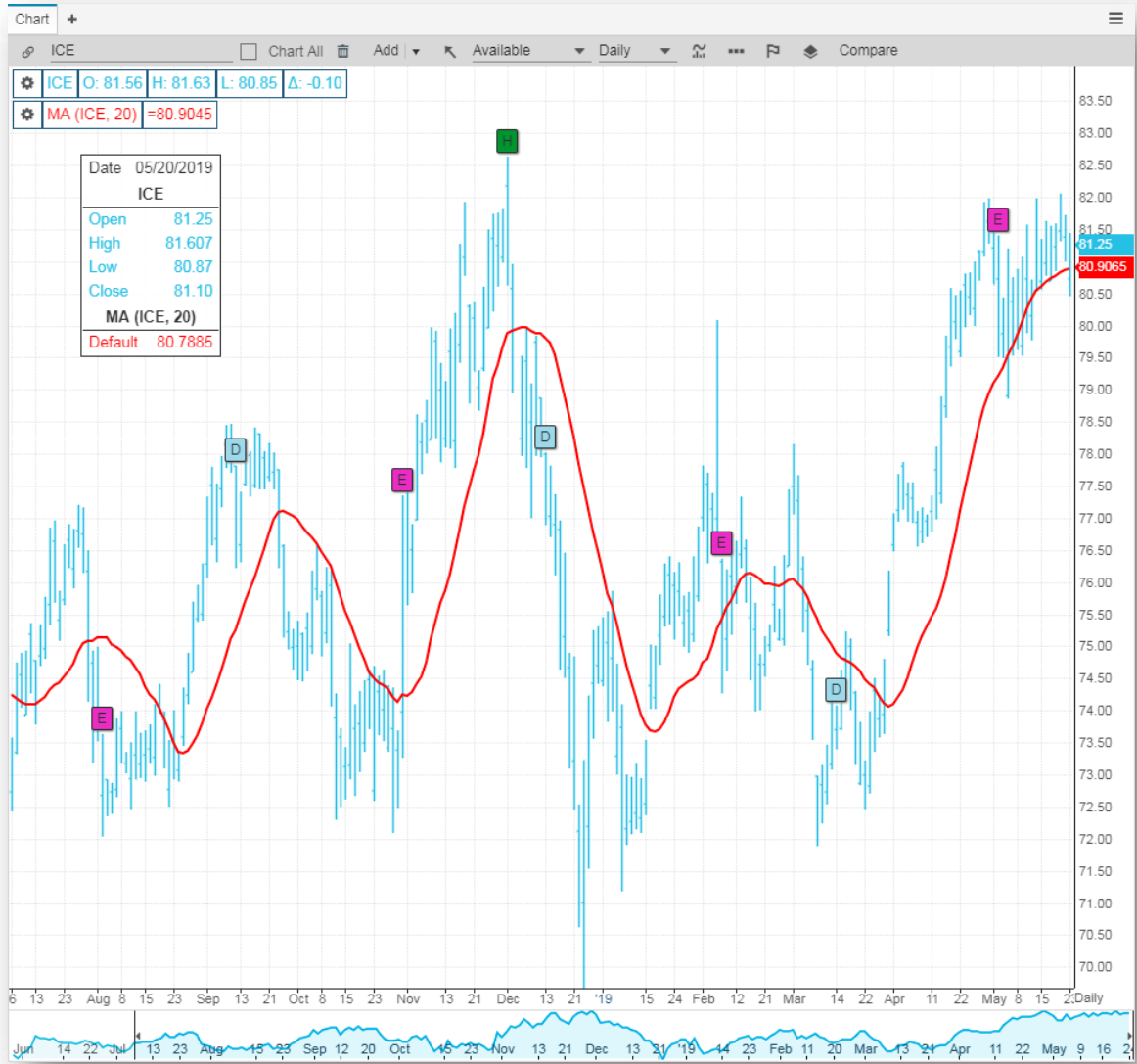
Mass Index: mass index is a form of technical analysis that examines the range between high and low stock prices over a period of time. Mass index suggests that a reversal of the current trend will likely take place when the range widens beyond a certain point and then contracts.



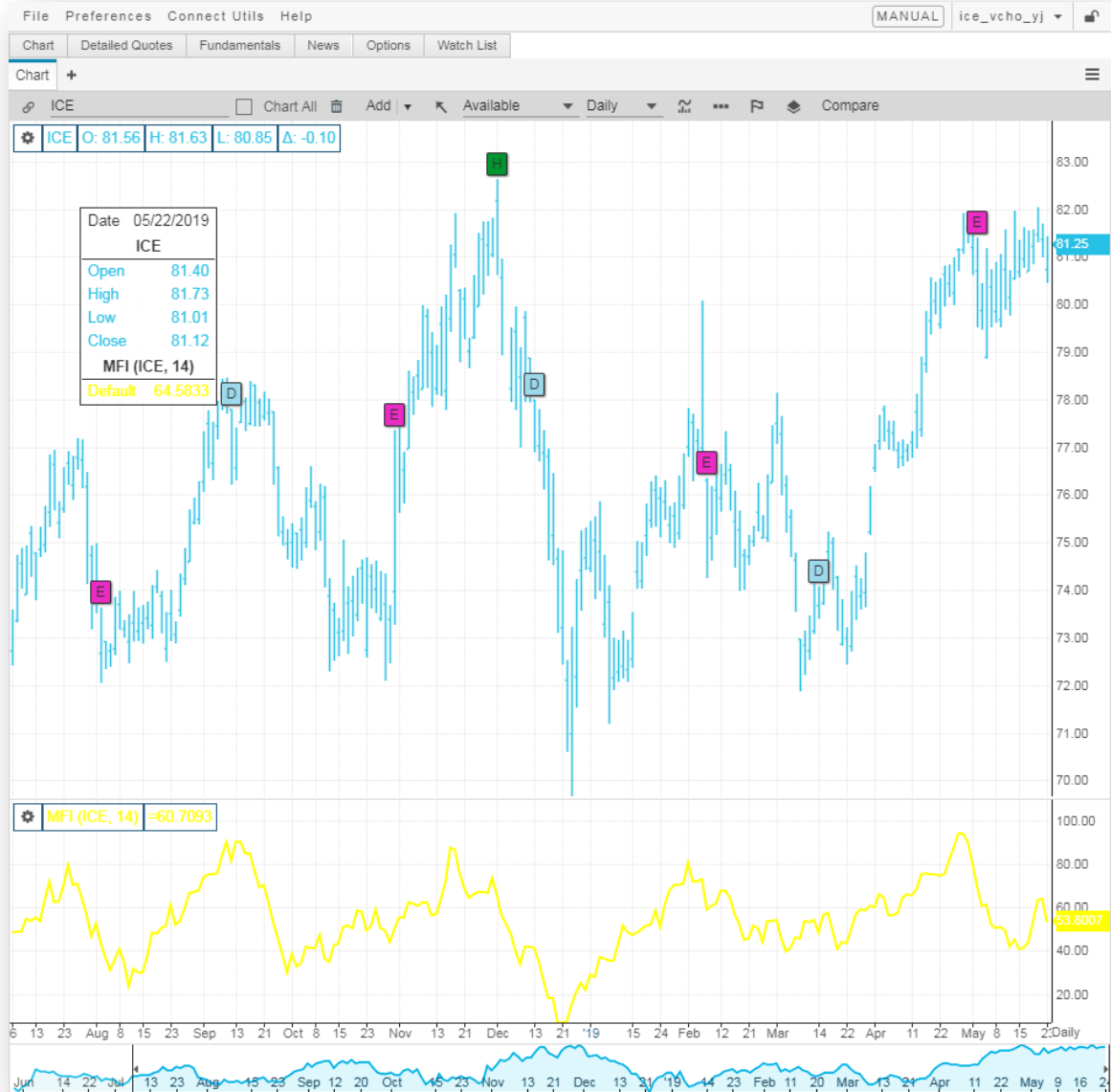
Momentum: calculates the continuous difference between two prices at fixed intervals of time



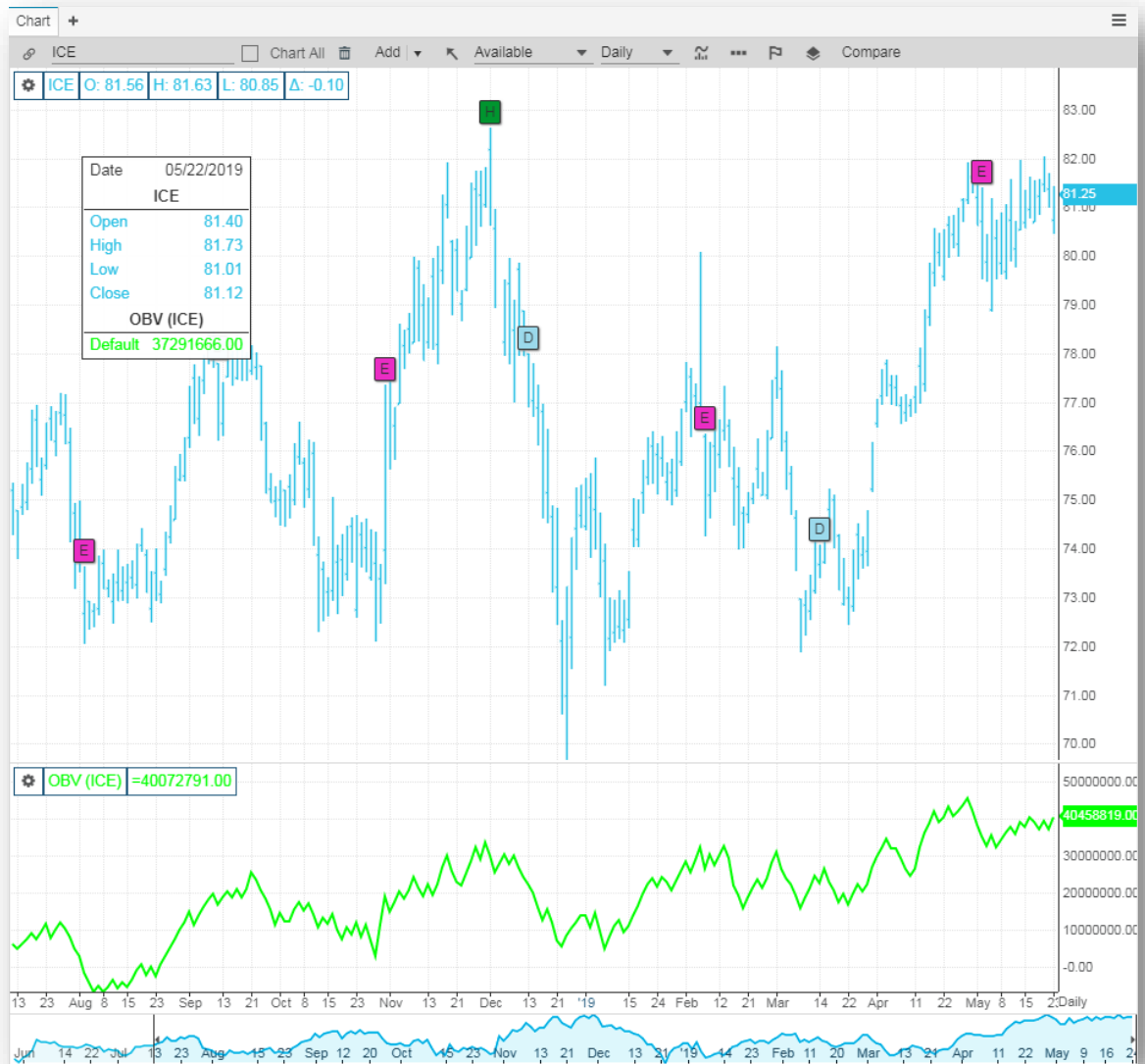
Moving Average: the average value of a security's price over a set period.
Generally used to measure momentum and define areas of possible support and resistance.



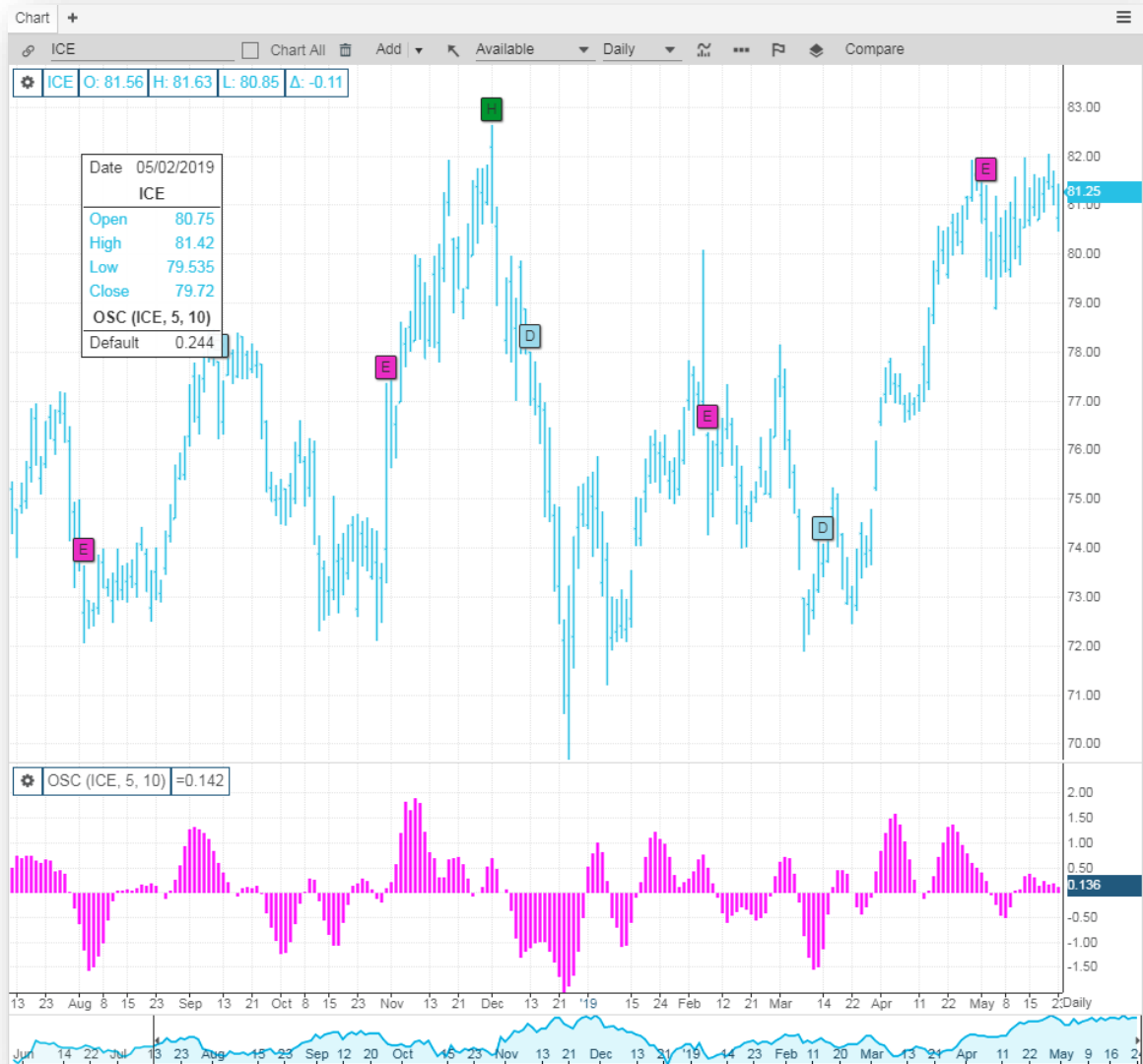
Money Flow Index: a momentum indicator that measures the strength of money flowing in and out of a security. Related to the relative strength index (RSI) but whereas the RSI incorporates only prices, the MFI also accounts for volume.



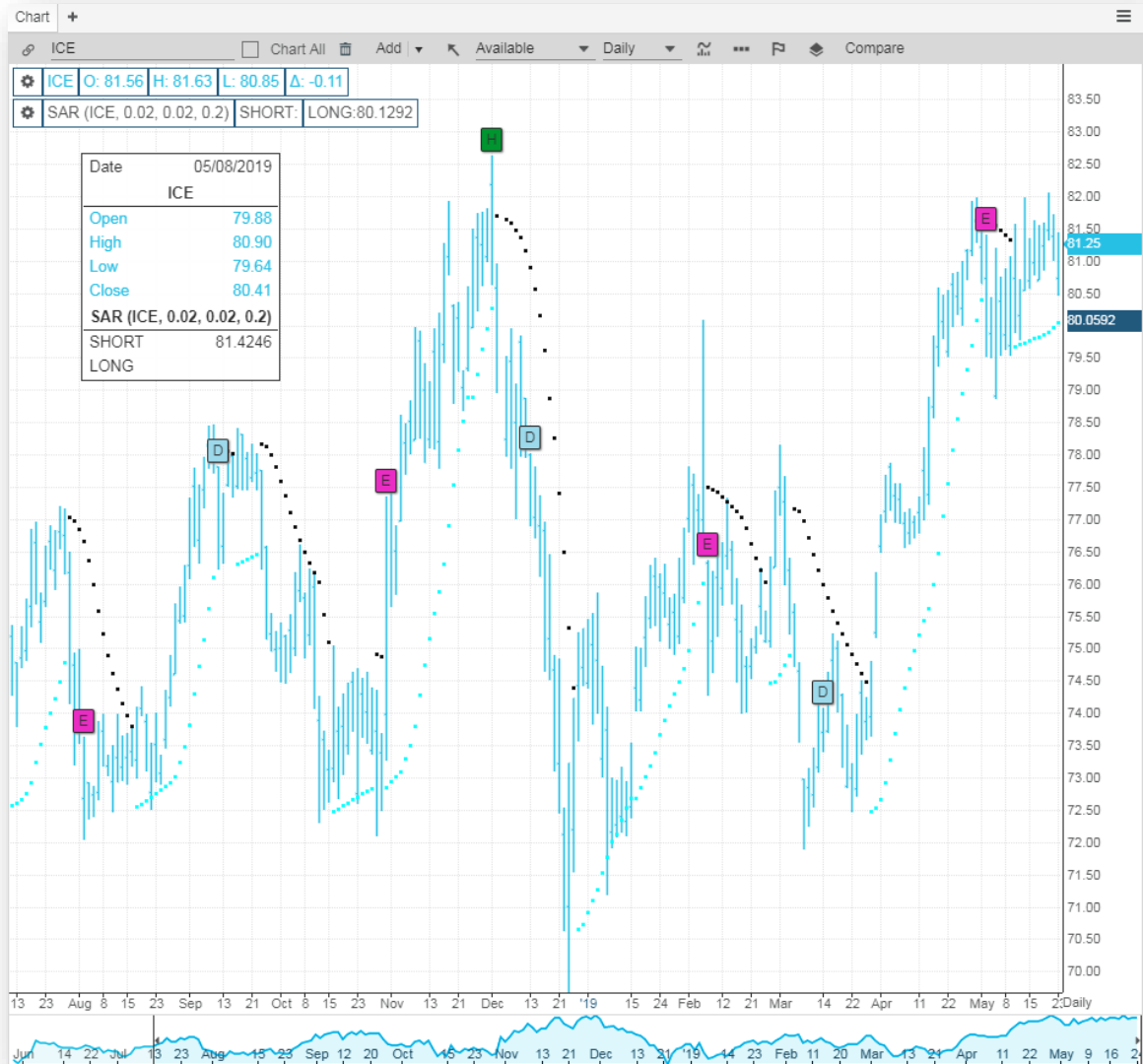
On Balance Volume: the continuous consecutive sum of volumes, whereby the entire volume of a day is added or subtracted to the volume of the previous day's OBV, if today's closing prices is above or below that of yesterday, respectively. Unchanged closing prices have no effect on the OBV.



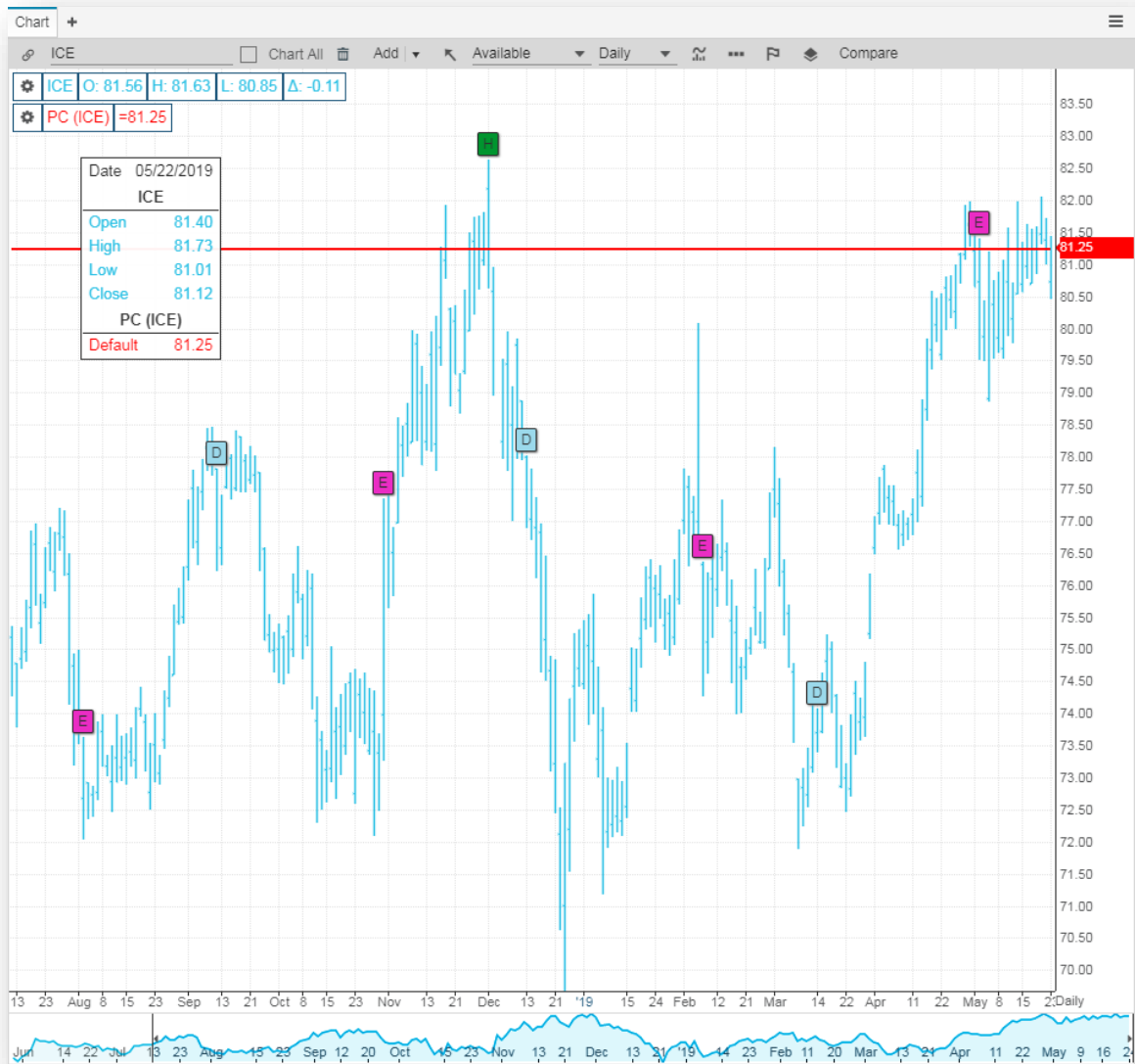
Oscillator: the arithmetic difference between two simple moving averages of differing time periods.



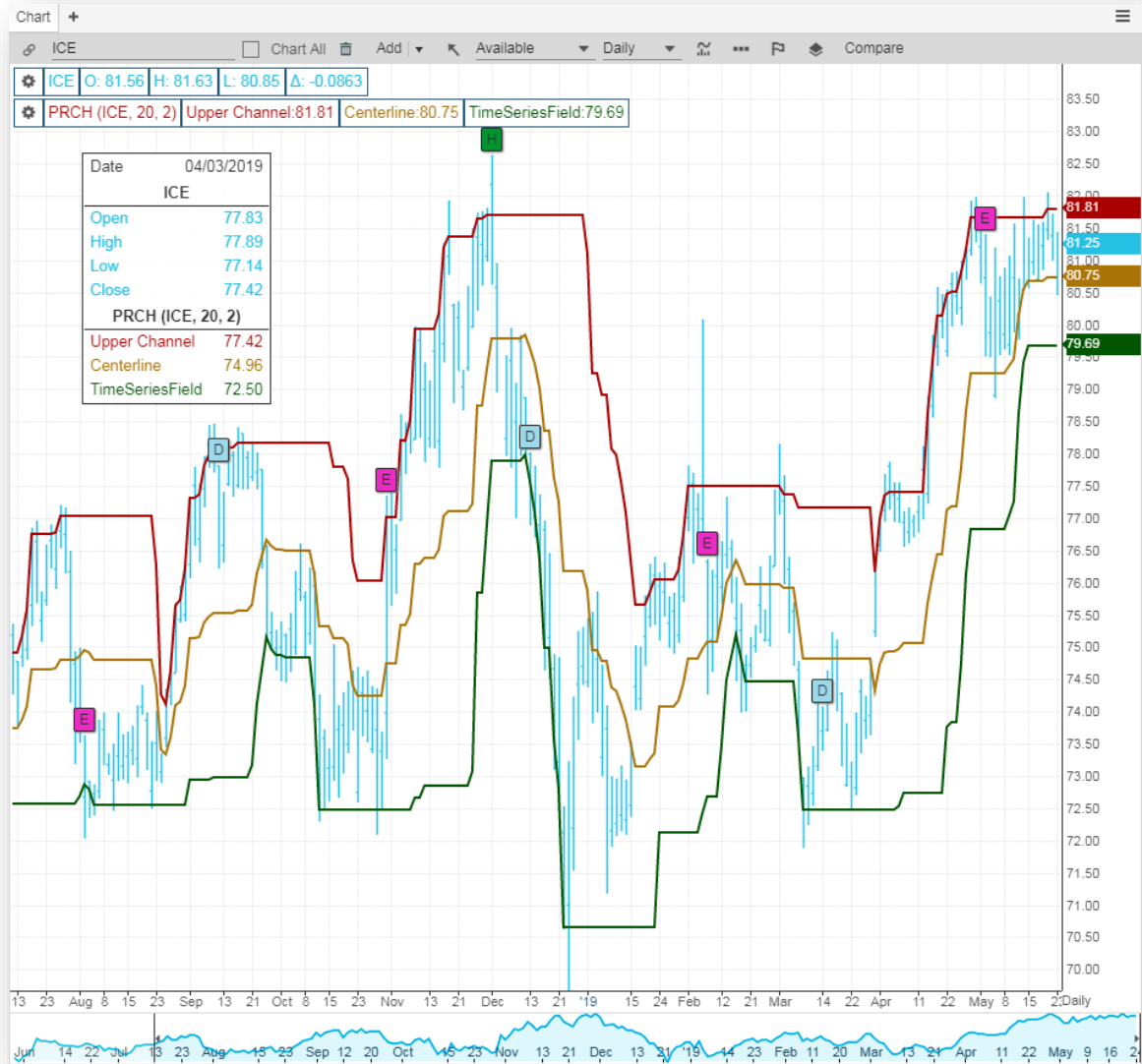
Parabolic Stop and Reversal: the study continuously computes ‘stop and reverse’ price points. Whenever the market penetrates this ‘stop and reverse’ point, you liquidate your current position and take the opposite position.



Previous Close: displays the closing price of the previous trading day.



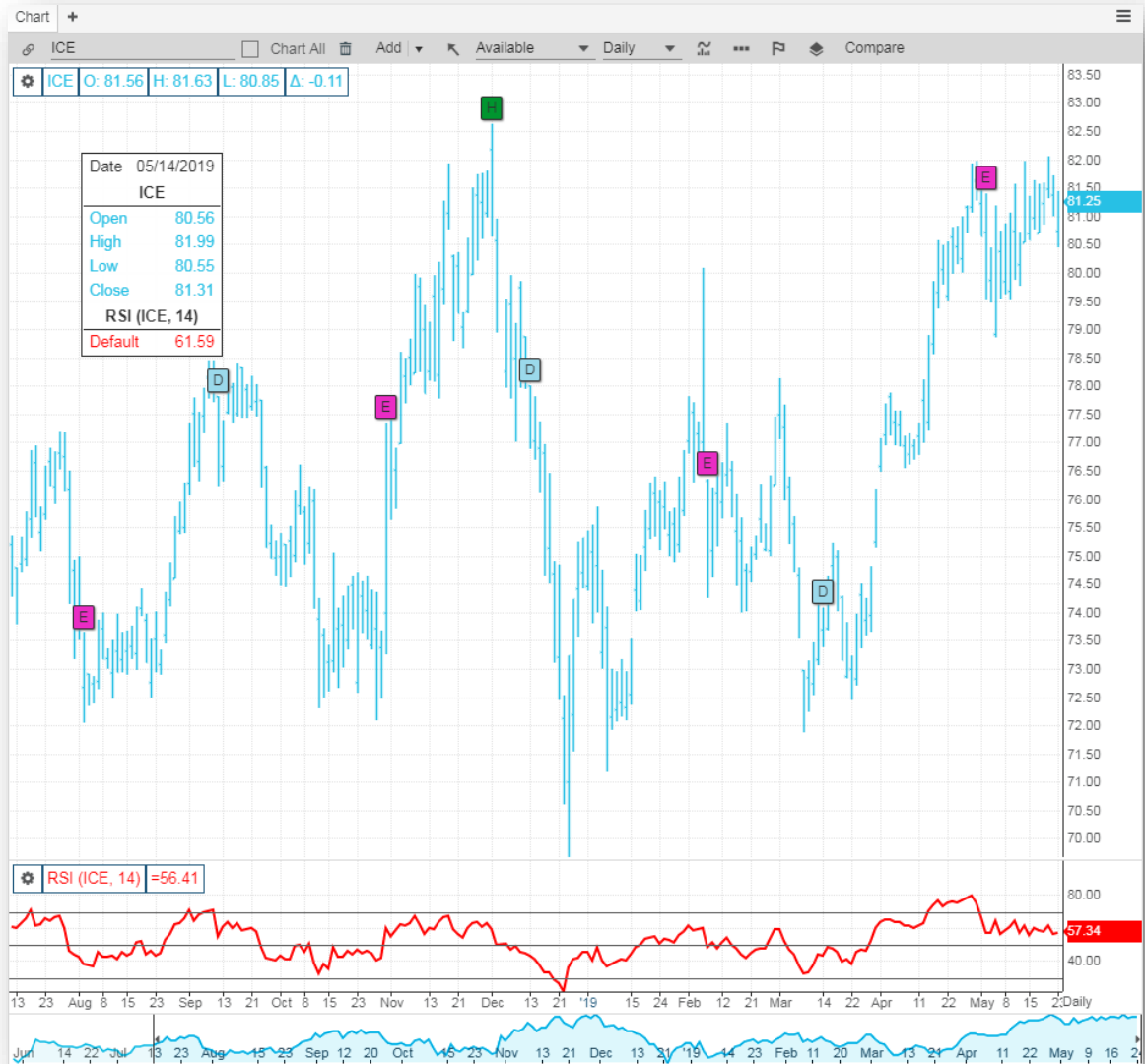
Price Channel: price channels are lines set above and below the price of a security. The upper channel is set at the x-period high and the lower channel is set at the x-period low. For a 20-day price channel, the upper channel would equal the 20-day high and the lower channel would equal the 20-day low.



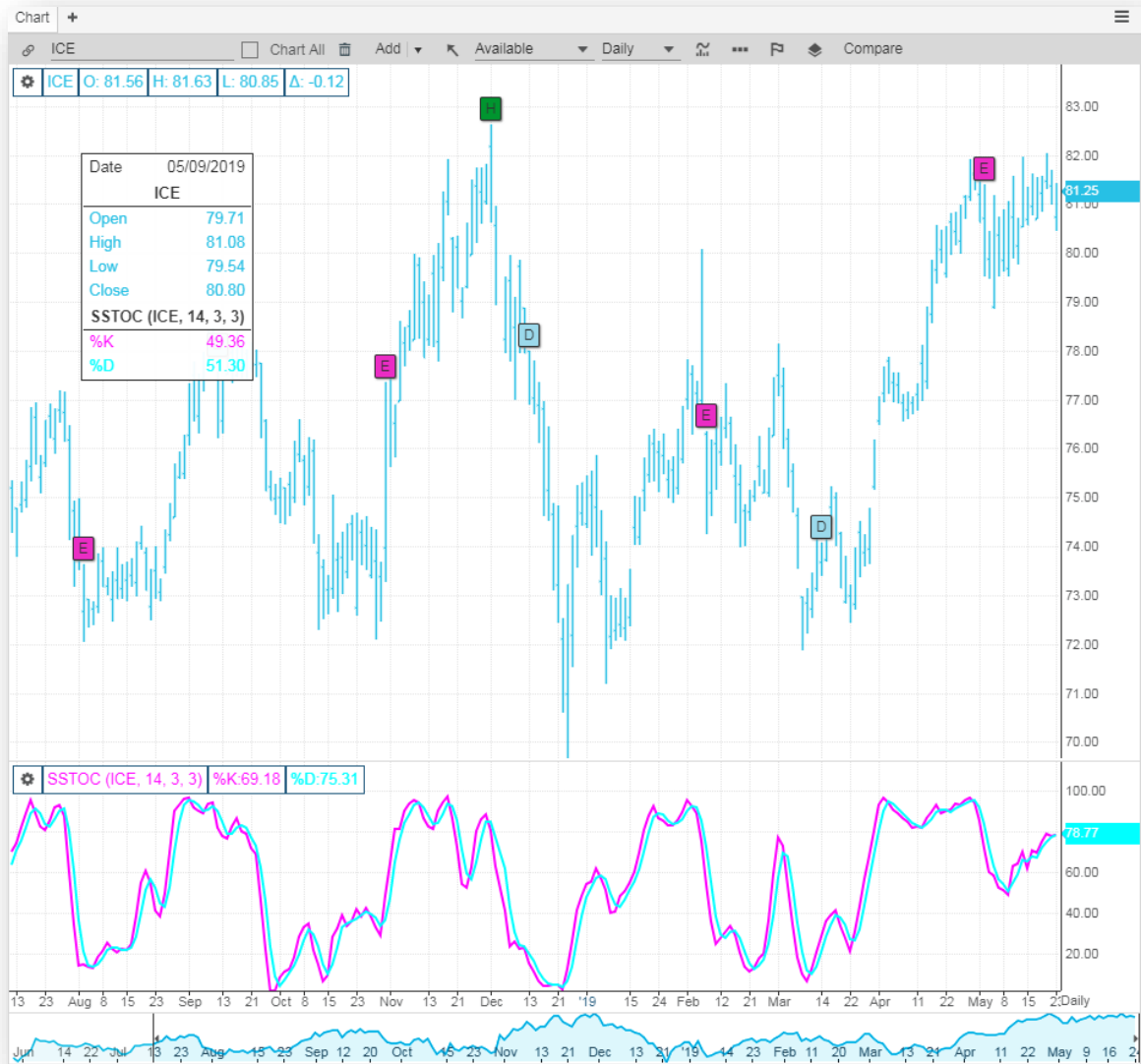
Rate of Change: the percentage change in price over the last n periods



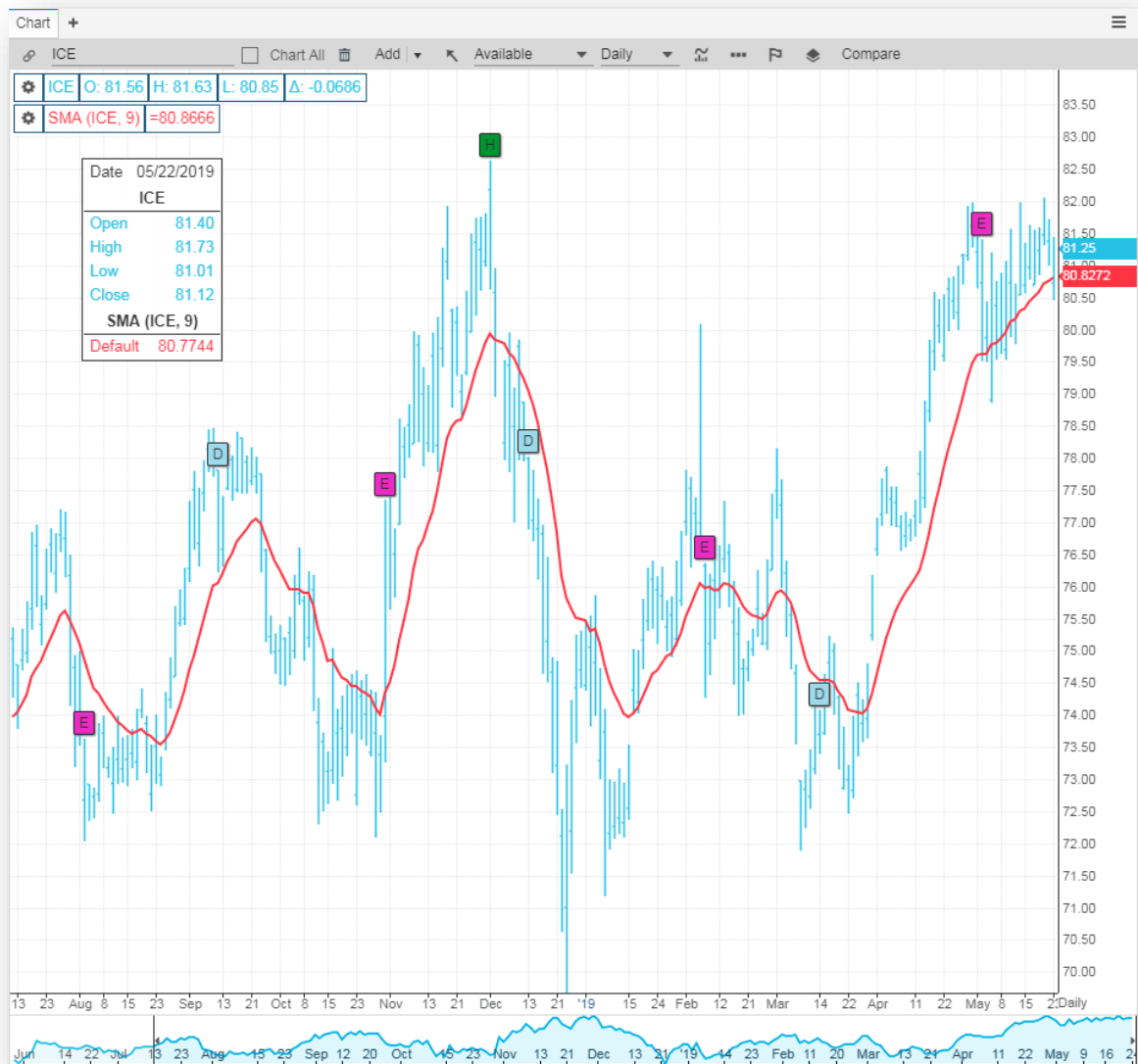
Relative Strength Index: the internal strength of an instrument as compared to former prices over a specified period of time



Slow Stochastic: an oscillator, smoothed using a moving average, designed to indicate oversold and overbought market conditions.

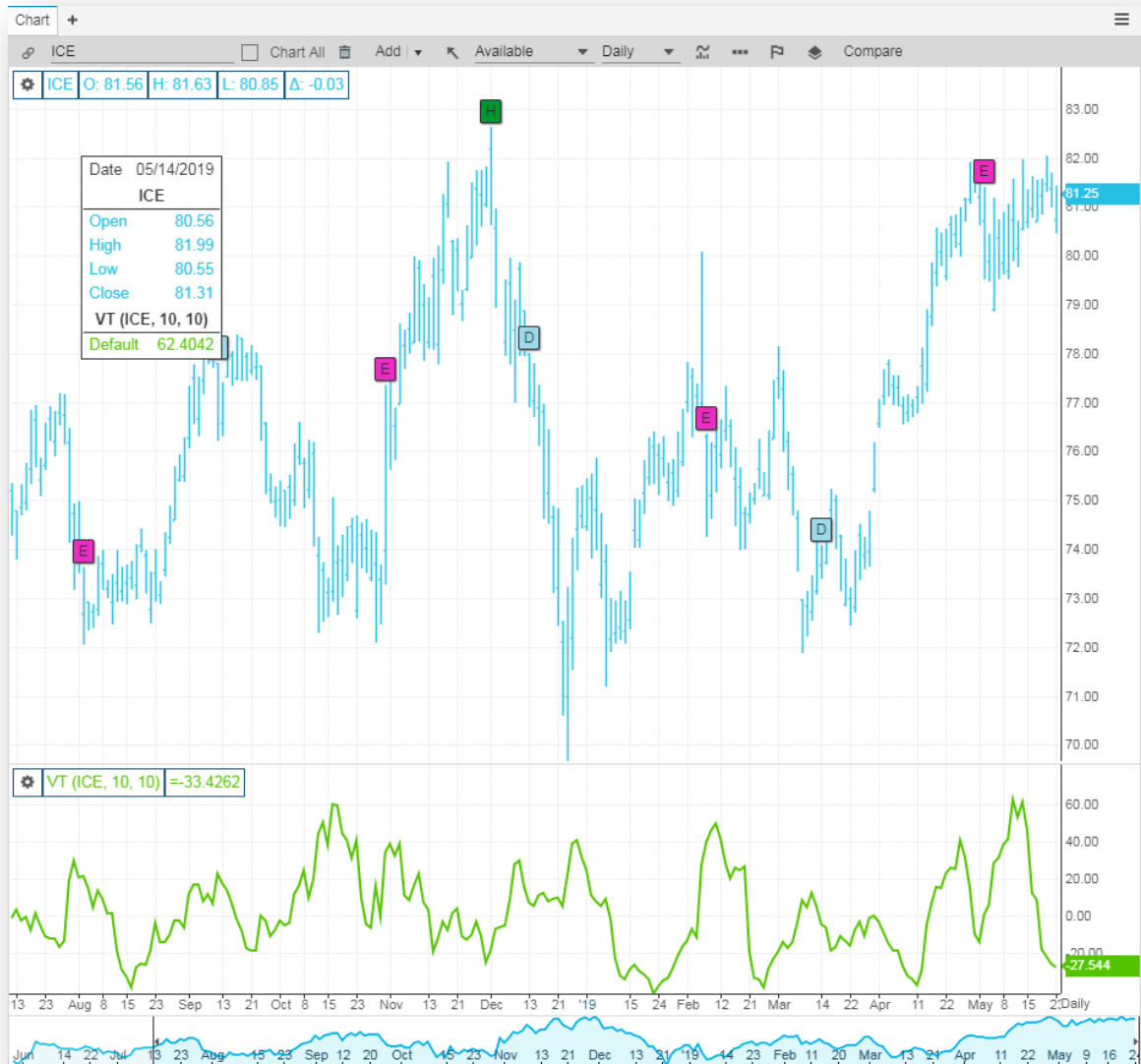


Smoothed Moving Average: an exponential moving average of which a longer period is applied to further smooth the curve

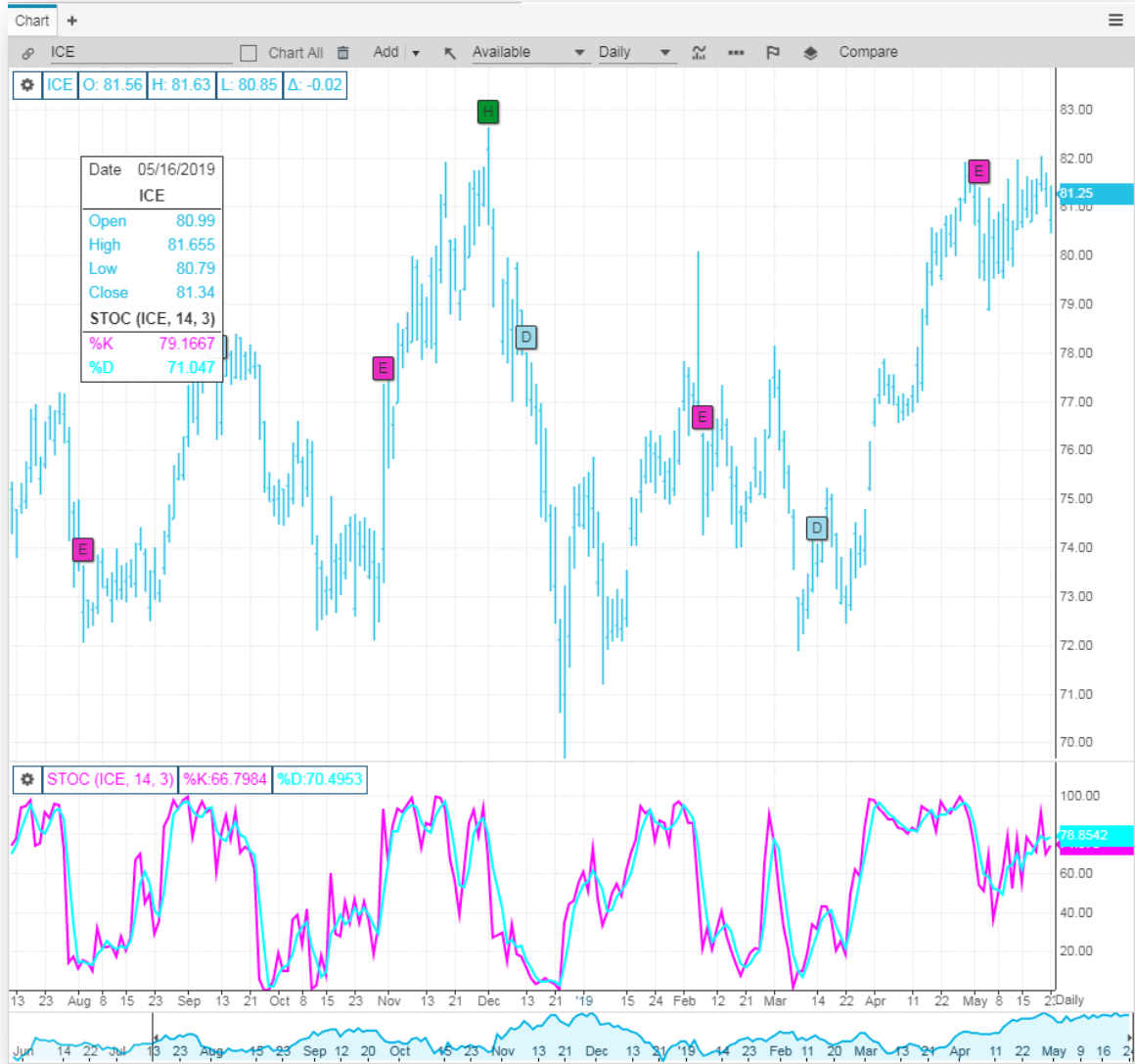


Standard Deviation (Volatility): standard deviation is a statistical term that measures the amount of variability or dispersion around an average. Standard deviation is also a measure of volatility. Generally speaking, dispersion is the difference between the actual value and the average value. The larger this dispersion or variability is, the higher the standard deviation. The smaller this

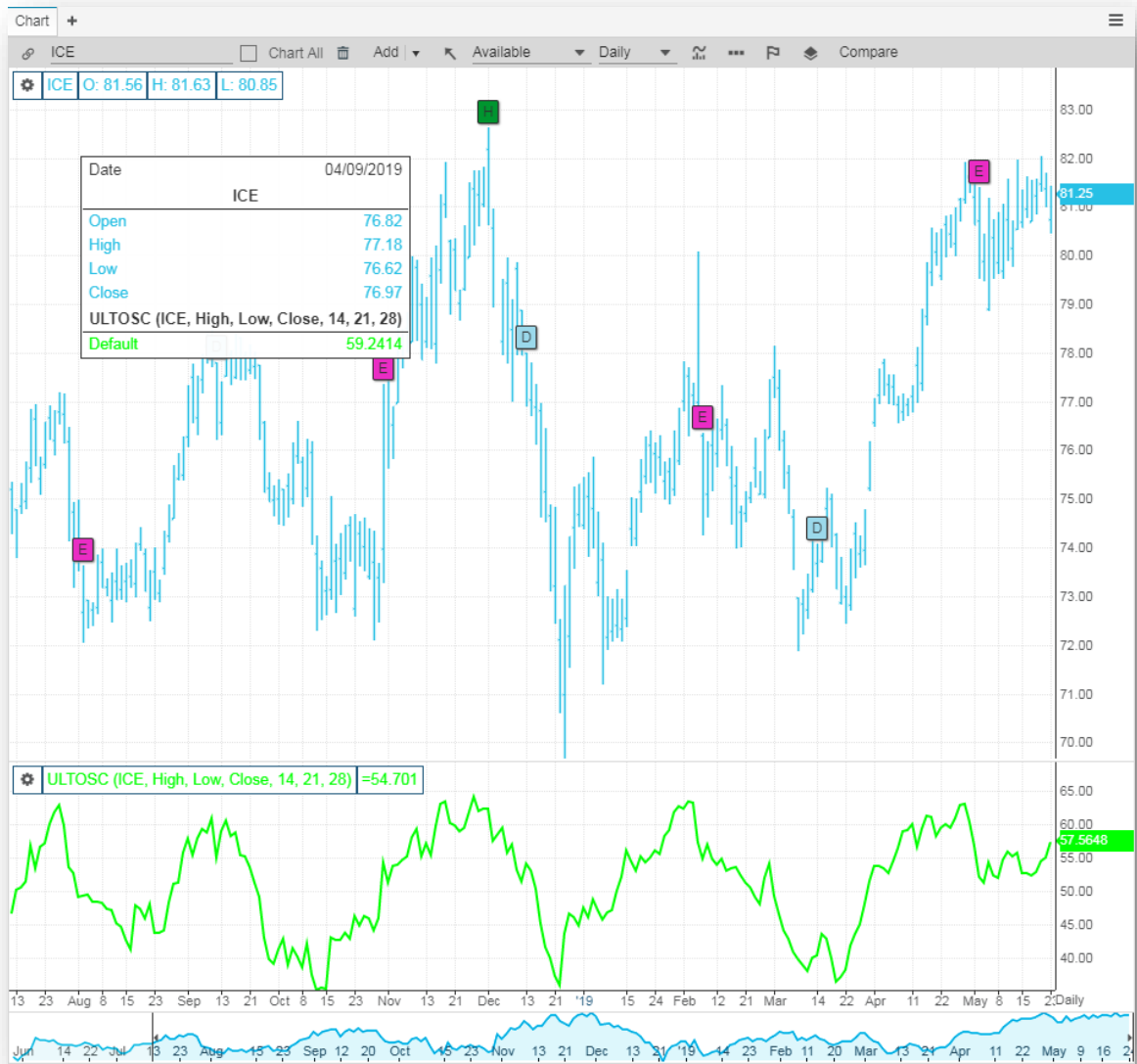
dispersion or variability is, the lower the standard deviation. Standard deviation can be used to measure expected risk and determine the significance of certain price movements.



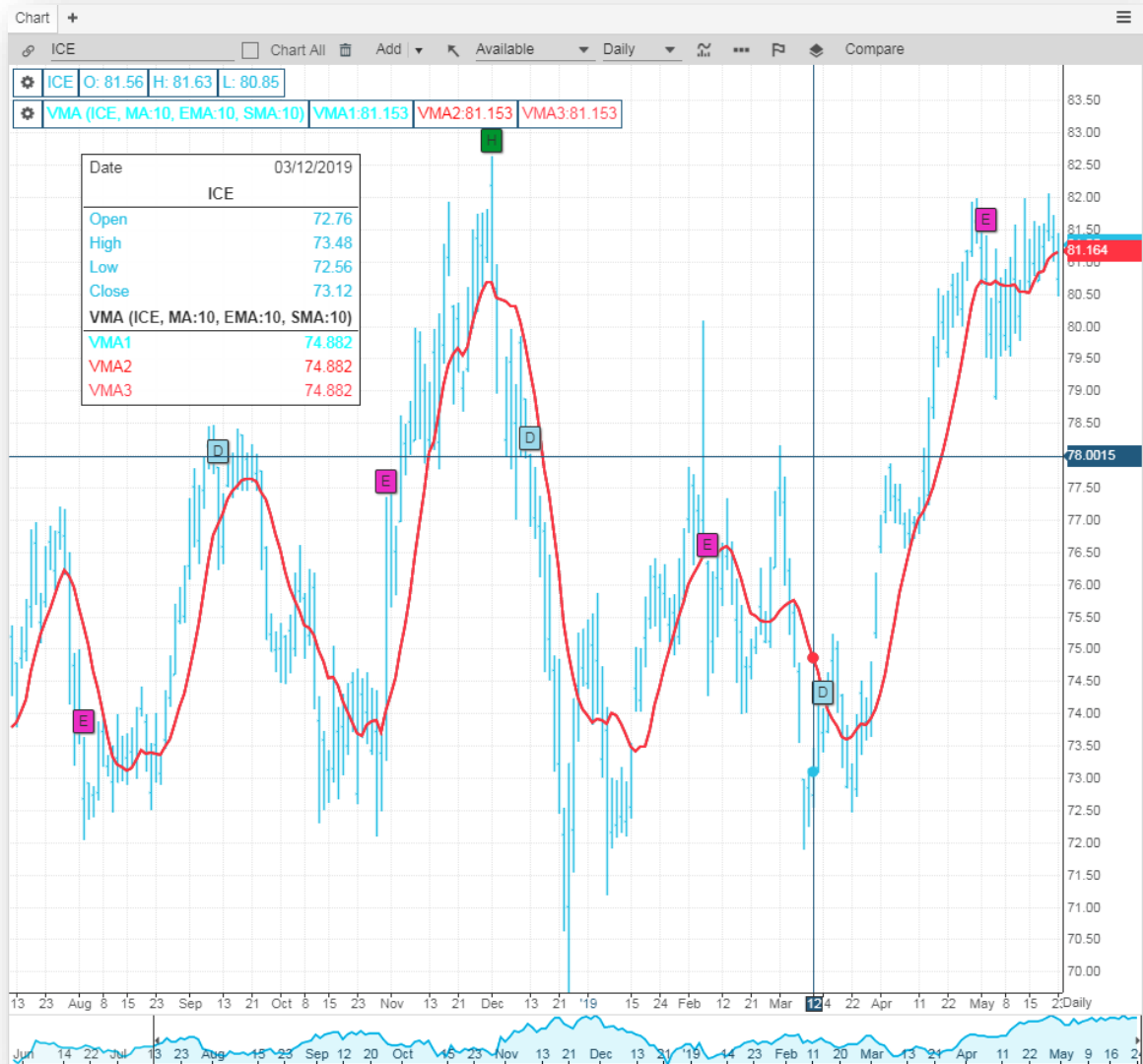
Stochastic: compares the difference between the closing trade price of an instrument and the period low, relative to the trading range over an observation time period



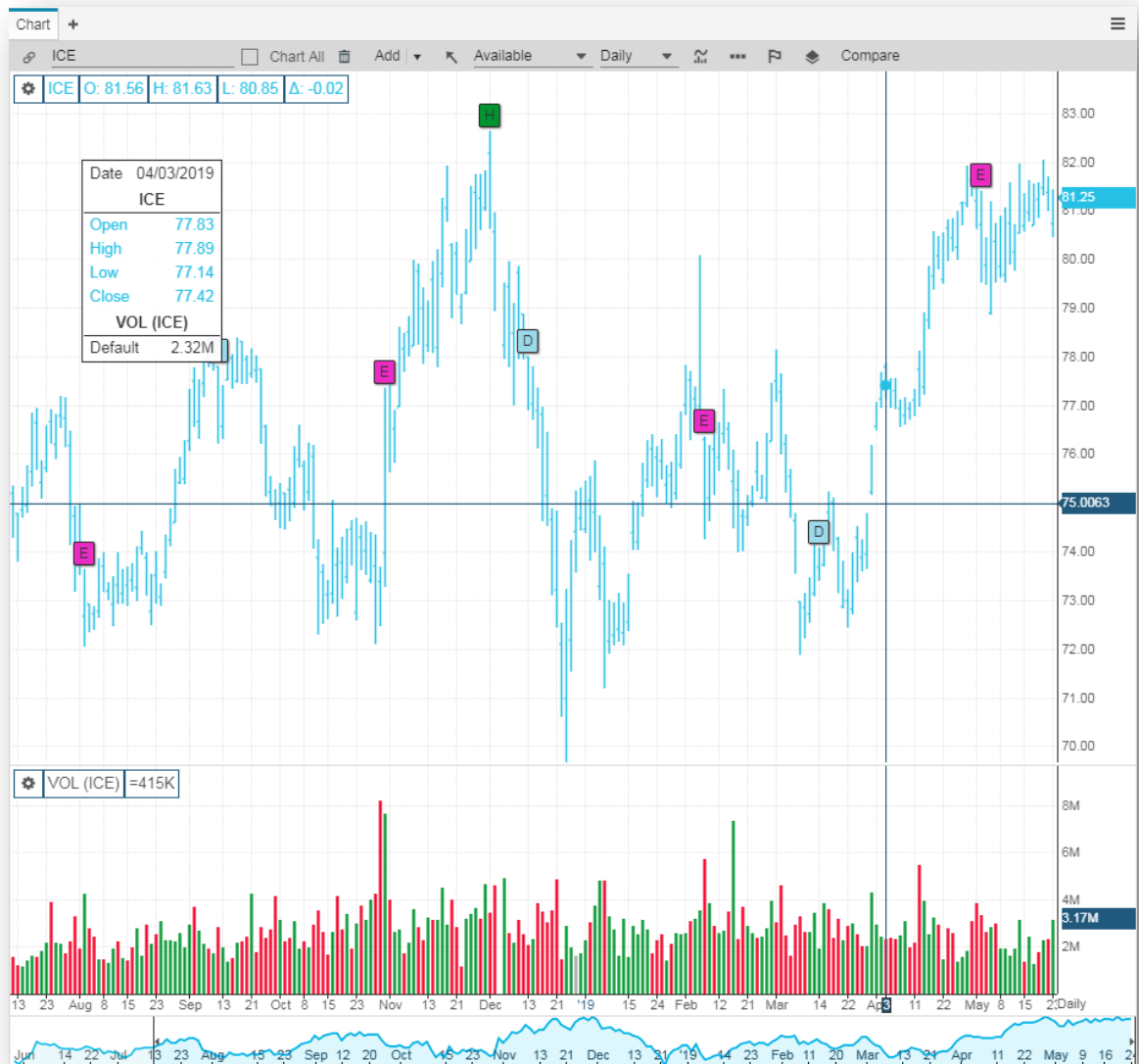
Ultimate Oscillator: compares the instrument's price with its price x-periods ago



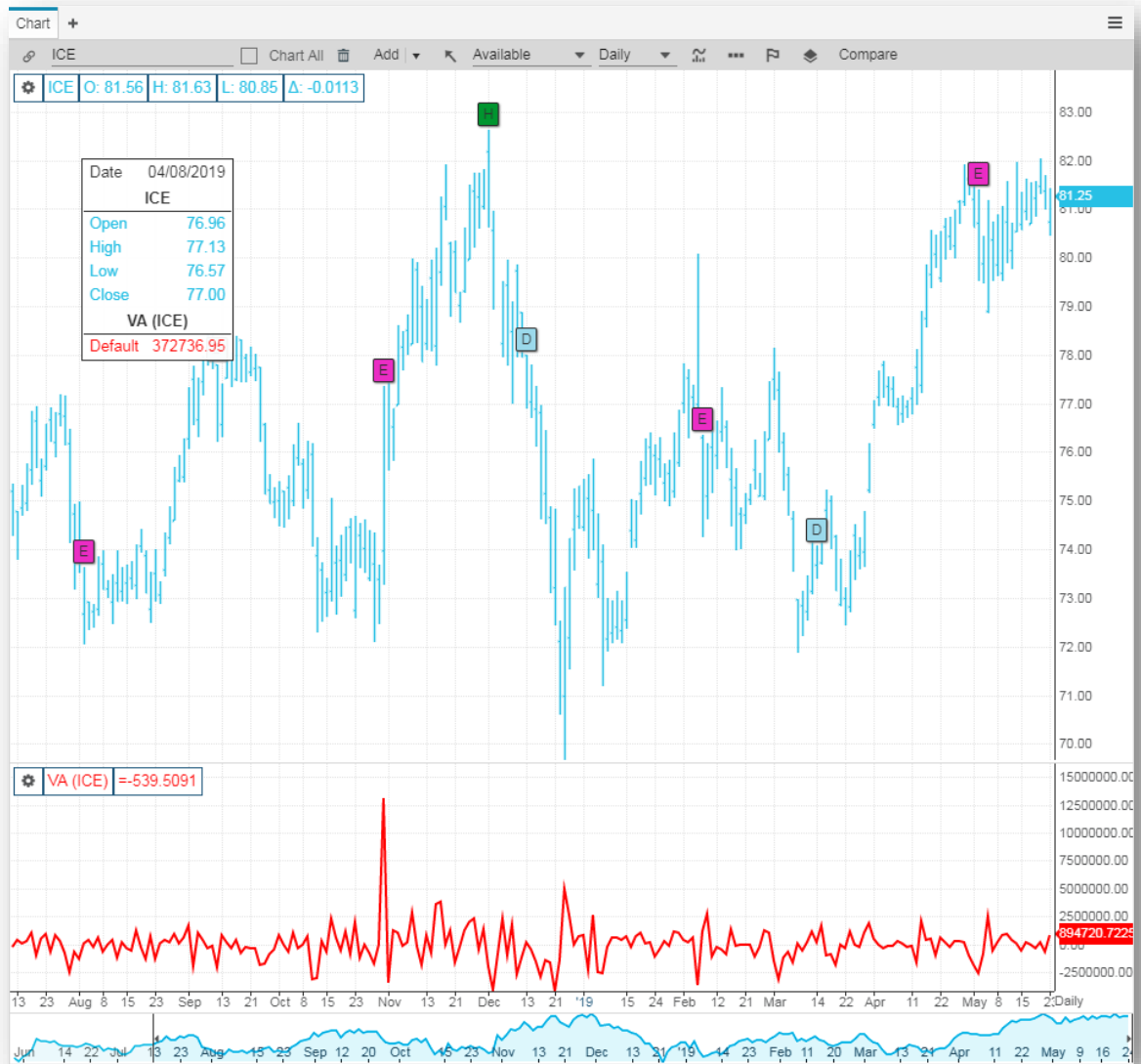
Variable Moving Average: a combination of the normal moving average, the exponential moving average and the smoothed moving average.



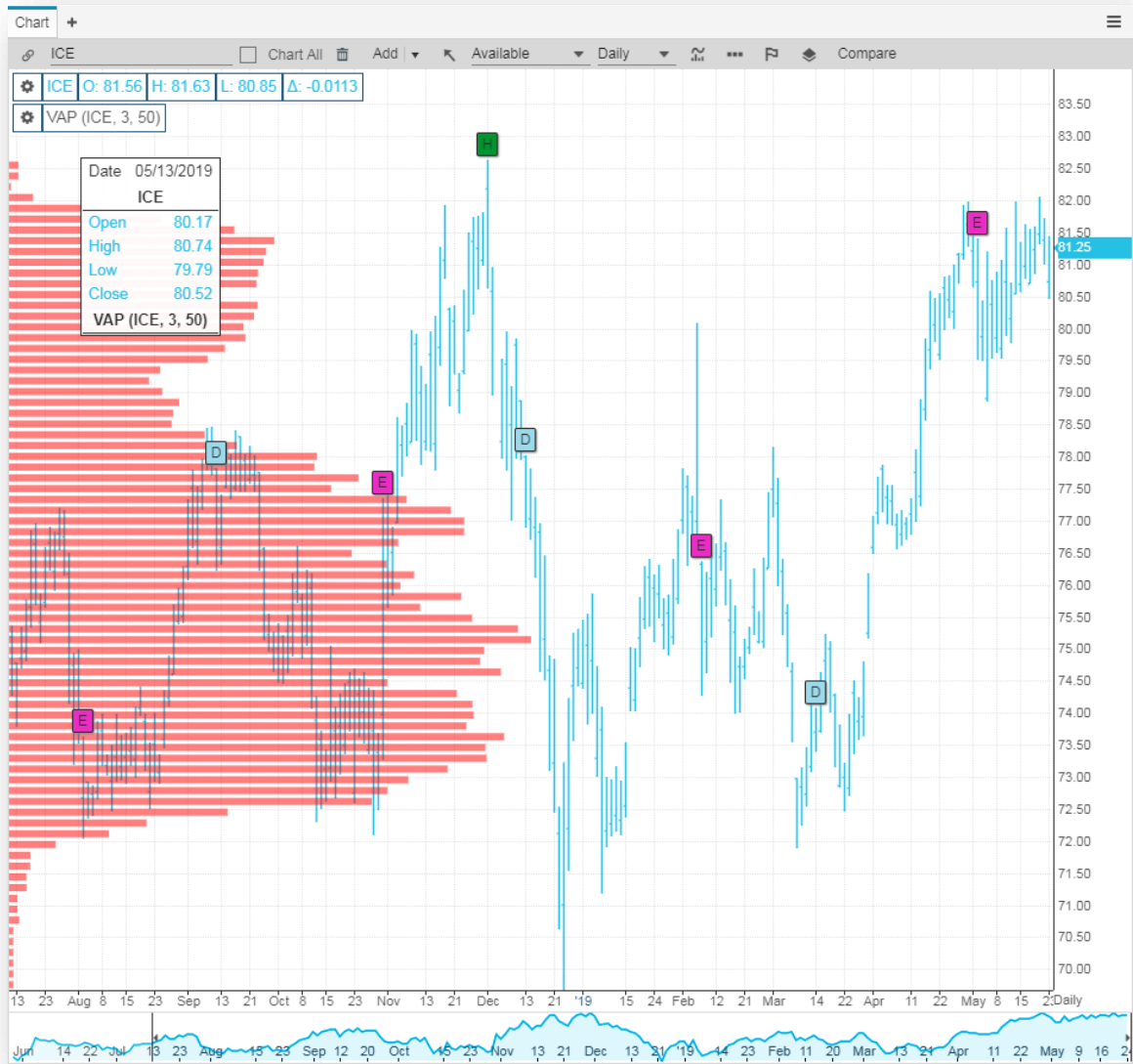
Volume: the magnitude of units (shares, contracts, etc.) executed during a specified time period.



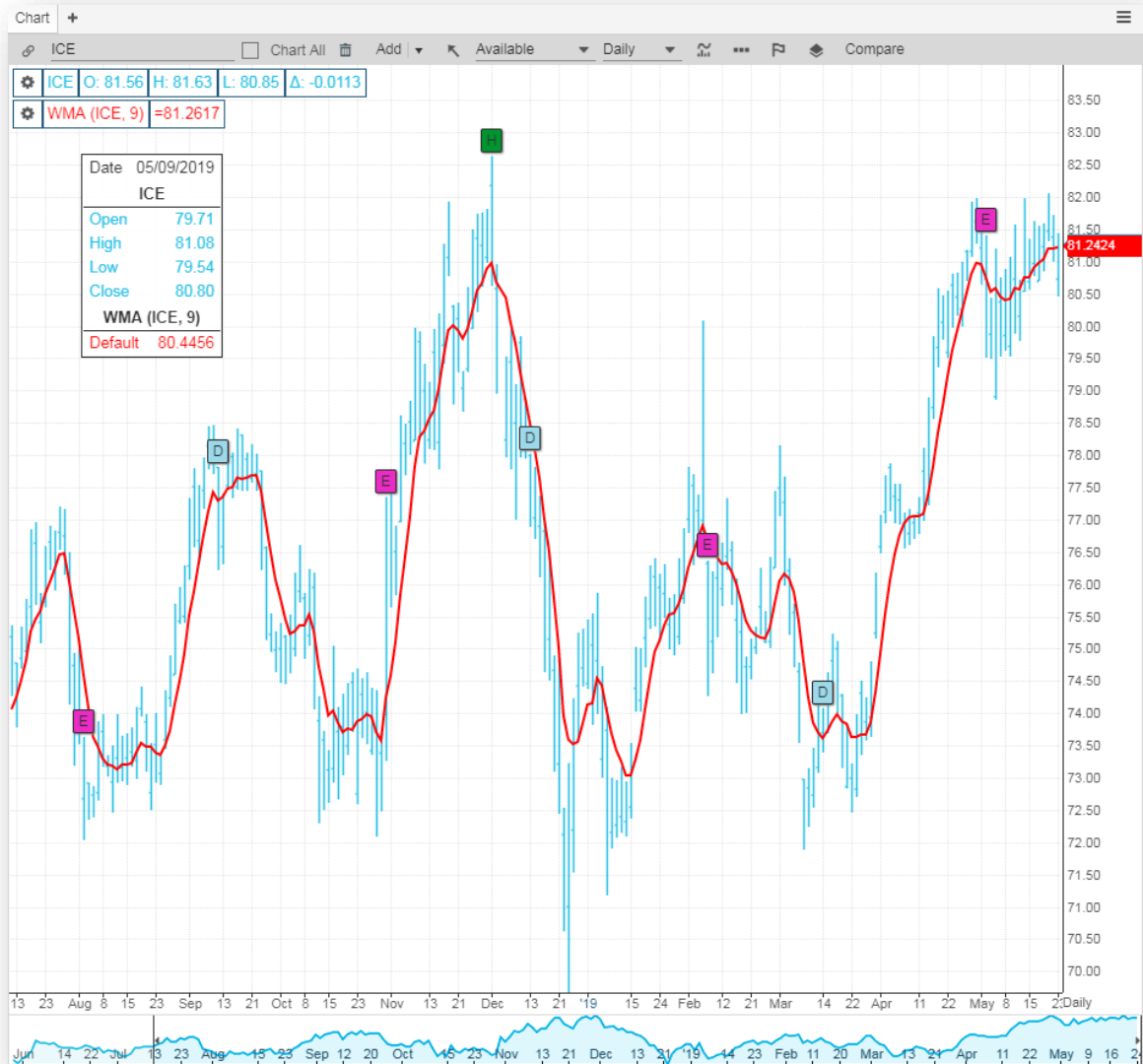
Volume Accumulation: the volume accumulation indicator combines volume and price-weighting that attempts to show the strength of conviction behind a trend; the volume accumulation indicator might prove useful in uncovering divergences.



Volume at Price: displays cumulative volume at price points.



Weighted Moving Average: designed to give the current or the recent price more weight than the previous prices



William's %R: the difference between the period high and today's closing price with the trading range of the specified period.

