



QuoteCenter Tips

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General

How to startup a Quote Center workbook

To automatically open up your last workbook, select VIEW | WORKSTATION SETTINGS | Checkbox 'Load Last Workbook on Startup'.

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How to auto-save Quote Center workspaces

To automatically save your workspaces, select VIEW | WORKSTATION SETTINGS | Checkbox 'Auto Save Workspace Changes' or 'Auto Save Workspaces every xx Min'.

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Working with custom Quote Center workspaces

There are a few different ways to create a new workspace. By far, the easiest is to use the FILE | NEW SPLITTER WORKSPACE command. This will allow you to EDIT | ADD DISPLAY and keep the windows within the workspace in proportion to the other worksheet displays. It's hard to explain, but easy if you can figure it out. Once you have added your first display, say MarketWatch, resize the MarketWatch window. Now, add a new display, say NewsWatch. See?! It will automatically fill in the remaining space on the worksheet. These windows can be resized without overlapping existing windows, Cool!

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Managing the Quote Center splitter workspace

To create a new pane:

1. From the **File** menu, select New Splitter Window or click
2. Press and hold SHIFT
3. Grab a horizontal or vertical pane border and drag to create a new pane

To resize a pane:

1. Drag the pane border and release when at the desired size

To delete the pane:

1. Right-click on the pane frame
2. Select **Delete Pane** then Top/Bottom or Right/Left from the cascading menu

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How to reorder Quote Center workspace tabs

1. Right-click on a workspace tab
2. Select **Reorder tabs**.... The Reorder Tabs dialog appears
3. Drag the tabs to place them in desired order
4. Click **OK** when done

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How to omit Quote Center symbol prefixes

In order to enter a symbol without prefixing 'us;' to it, click on the flag at the bottom of Quote Center and set the default country and vehicle class. If these are set to US and Corporate Class, you do not have to enter a prefix. e.g., typing SPX or us;SPX will give the same thing; typing '@ES.1' or 'us@ES.1' and get the same thing.

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Using Quote Center symbols in EOD files

To download the most current data using Quote Center Symbols in the Downloader, you need to have Quote Center running in the background.

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Forex data availability in Quote Center

Forex data is included with all QC data packages.

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Dynamic Data Exchange (DDE) in Quote Center

Use the DDE to transfer real-time information to other applications such as Excel. Note: QC must be running in the background for the worksheet to update.

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Quote Center derived fields

Derived Fields allow you to create your own custom-defined data fields. For example, you can subtract one field from another and define as your own name. Notes: 1) Derived field indicators are created in the BF directory; and, 2) After deleting a derived field entry it will remain listed in the BF directory until QC is restarted.

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Setting up Quote Center alerts

1. Right-click on your chosen security or data field and select Alert from the menu
2. From the Limit Alert tab of the Alert Editor, enter the information for the alert
3. Click the Alert Information tab and select the desired alert notification methods
4. Click **OK**

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Setting primary exchange over composite in Quote Center

When this option is turned on, all quotations for the entire workstation are quoted from the prime exchange only. The ticker is still consolidated, but data elements that are exchange-specific are restricted to the prime exchange.

1. Double-click on the country flag found on the status bar
2. Select Show Primary Exchange over Composite checkbox
3. Click **OK**

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Saving styles of selected controls in Quote Center

A user can set the fonts, window position (for pop-ups), properties as well as commands. For example, if you want the time & sales service to always display just the last sale, volume, time, set the preferences then save that style. The user can have multiple styles for each service. Several styles are included by default with the installation.

To Save a Style for an embedded service:

1. Set the service to how you want it displayed
2. Click **Edit** on the menu bar
3. Select **Save Style of Selected Control**
4. Enter a name for the style (to set the style as your default, click the Set as Default check box)
5. Click **OK**

To Save a Style for Pop-Up:

1. Set the pop-up service to how you want it displayed.
2. Right click on the services title bar and select **Save as Default** (or **Apply Style to Pop-up**).
You can apply any saved style to a pop-up service by selecting from the Apply Style to Pop-up list available from the right-click menu)

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Hotkeys in Quote Center

MetaStock Quote Center is installed with a set of pre-assigned Hot Keys for your use. These keys can be overwritten and you can make your own assignments using other keys. To see the list of Hot Keys that come pre-assigned with your workstation, click Tools -> Hot Key Assignment from the menu bar. When making Hot Key assignments, you can use functions keys and other key combinations using the Shift, Ctrl, and Alt keys. The default hot keys can be overwritten with new assignments, but cannot be removed. You can set the action of the hot key to perform one or more different actions.

To assign a hot key:

1. Click **Tools>** Hot Key Assignment...from the menu bar.
2. When the Hot Key Assignment dialog appears, click on the **New** button.
3. The Assign Hot Key dialog appears. Using your keyboard, enter the key combination you want to assign.
4. Click **OK**.
5. The Specify Actions dialog appears. Enter a description in the box provided at the top right. Select the style or command assignment from the scroll box on the left, and click the **Assign>>>** button.
6. If required, click on the newly Assigned Action and select which symbol the service should use from the radio buttons in the lower left corner.
7. Select additional actions as needed.
8. Click **OK** then click **Close** and test your Hot Key.

Editing a hot key:

Only hot keys you have assigned on your workstation can be edited. Hot Keys that come assigned with the workstation cannot be edited but can be overwritten by using the Assign a Hot key shown above.

1. Open the Hot-Key Assignment editor under **Tools>** Hot-Key Assignment...
2. Select the hot key you want to alter and click the **Edit** button.
3. Enter a new description in the box provided at the top right and make your required edits.
4. Click **OK**, then close and test your Hot Key.

You may also use the **Remove** button to delete a hot key that you have created. If the key came pre-assigned with the workstation, the hot key will revert to the original assignment when you click remove.

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Double-click assignments in Quote Center

MetaStock Quote Center allows you to quickly assign double-click actions to data fields. Double-click actions assigned to a data field will be universal for that field across all services. Two methods are available to assign a double-click:

Assign from Reuters Navigator

1. Right-Click on the Reuters Navigator command that you want to assign
2. Select **Assign Double-Click...**
3. Pick a data field on which to make the assignment
4. Click **OK** with the assignment has been completed

Assign from a Data Field

In our example, we will add a double click assignment to the symbol field in a MarketWatch display that will launch a ZoomDynaQ display.

1. Within a MarketWatch, right click on the symbol field and select Assign Double-Click for: Symbol (FLD_SYMBOL). The menu item is context-sensitive and will indicate which field you have selected. If the field already has an assignment, you will be given the option to delete the current assignment.
2. The Specify Actions dialog appears. Select an action Style or Command and click the Assign >>> button. In the example shown below the Style ZoomDynaQ Quick App has been selected.
3. Select which symbol to use by when you double-click.
 - Use Broadcast symbol will use the symbol in the Broadcast box.
 - Use Double Click Symbol will use the symbol on which you double-click. This is the default option and will be used if not other selection is made.
 - Always use this symbol allows you to set a specific symbols to use.
4. Click **OK** to complete the assignment.

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Visual links in Quote Center

Visual Linking is a powerful tool used to get quick access to frequently used data or features. The Visual Linking wizard makes it easy to enhance the functionality of services and to perform tasks with a single click of a button. No programming experience is necessary as the wizard automatically writes the code for you. It is important to note that setting a visual link will override double-click assignments for data in the display.

In the following example, we will show you how to link from a MarketWatch to an Athena chart. You can set multiple links to any service in your workspace.

1. Click on the icon located on the Main toolbar
2. Click and hold the left mouse button in the MarketWatch and drag the mouse into the Athena graph. Release the left mouse button.
3. The Create a Link dialog box appears indicating the type(s) of link available.
4. Select a chart type and click on the **OK** button to complete.
5. Double-click on the symbol in MarketWatch. The mouse action sends the Visual Linking command to Athena to retrieve a chart for that symbol.

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Symbol Lists

Working with symbol lists in Quote Center

A symbol list is a group of symbols created for use with multi-symbol services such as MarketWatch, NewsWatch, Quoteline and DynaQ. Only one version of the list needs to be maintained, regardless of the number of services in which the list is used. Therefore, edits to a symbol list in one service, change the list for all services where it is currently loaded. However, to permanently change the list, you must save it.

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Create a symbol list

1. Once symbols have been added to the service, right-click and select **Symbol List> Save** from the menu. The symbol list dialog will appear.
2. Type a name for the new symbol list you have just created (symbol lists use the .BVL file extension)
3. Click **OK**. The name appears on the service's title bar and the list is saved to a file.

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Load a saved symbol list

All symbols currently entered in the service will be replaced using this method.

1. Right-click in the service, select **Symbol List> Load...** from the menu. The Load Symbol List dialog appears.
2. Select the name of the symbol list you want to use in the display
3. Click **OK**

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Editing symbol lists

1. Select **Symbol List> Edit...** from the right-click menu. The Edit Symbol List dialog appears.
2. To add a symbol, move the cursor to the point where you wish to insert a symbol. Type the new symbol and press Enter.
3. To delete a symbol, select the symbol and press the Delete key.
4. Click **OK** when finished editing the list. Note: You do not need to type source info.

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Load Dynamic Symbol Lists

You are now able to download symbol lists that are stored in the Central System Portfolio Database such as index constituents, industry groups and sectors.

1. Right click and select Load Chain from the menu
2. Select either Real-time Ranking Lists or Central System Indices and Portfolios

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MarketWatch

MarketWatch information symbols

What is the significance of the different colors used in the information (i) column? Do they represent levels of importance of current news?

Just select HELP | INDICATOR LEGEND.

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MarketWatch categories

This is perhaps one of the best features I have learned about to date. Before now, I was creating multiple MarketWatch lists on my workspace to track different groups of symbols. Not necessary...

1. Create a MarketWatch list of symbols. Say 6 symbols.
2. Go to the first symbol and right-click SYMBOL | INSERT.
3. Now, on the new empty line, press the SPACEBAR and enter a name for the group of symbols that follows. Say 'group 1'.
4. Now, repeat this process by moving down to the middle of the list.
5. Create a 'group 2'. You will find that you can sort, arrange, move the symbols in a group independently of the other groups.

Real-time ranking lists in Quote Center in MarketWatch right-click and select LOAD CHAIN | REAL-TIME RANKING LISTS... then you will have a bunch of options to sort real-time market data. e.g., top \$ gainers, top % gainers, volume gainers, etc. The list is dynamic. Once you have the symbols tracking, you can select what information you want to track. e.g., net gain, daily % change, EPS, P/E, etc. These parameters are customized under TEMPLATE | SELECT FIELDS.

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U.S. Indices in Quote Center

To track U.S. indices in real-time:

Right-click on MarketWatch workspace | SYMBOL LIST | LOAD | US_INDICES | OK

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S&P groups in Quote Center

This option will list groups only, not individual securities.

To track general groups real-time:

Right-click on MarketWatch workspace | SYMBOL LIST | LOAD | NORTH_AMERICA | OK

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Industry-specific chains in Quote Center

This option will list individual securities contained within a specific sector.

To track a specific sector of stocks real-time:

Right-click on MarketWatch workspace | LOAD CHAIN | CENTRAL SYSTEMS | SEARCH e.g., S&P | OK .

Note: to search just for S&P 500 sectors, type 'S&P 500' in search string and check 'Description begins with search string'. The search will only list 50 results at a time.

To view additional results, continue clicking 'More' until the option is no longer available.

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Setting the correct time in Quote Center

If you see a difference between the last time that a price is recorded on Athena and on the MarketWatch, you can correct the times by setting the properties of the time axis in Athena and by right-clicking on any workstation element, then PROPERTIES | DATALAYER. Under the Database tab there is a section called Time Zones. Select CUSTOM OFFSET and type in the GMT +/- time zone. For CST, it is -5.

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Time axis compression in Quote Center

Right-click time axis | PROPERTIES | ATHENA BASIC | GENERAL

Fully Compressed: Discards periods with no data. A week of compressed daily data typically shows five periods, the weekends being discarded.

No Compression: Places gaps on the chart for periods with no data. A week of expanded daily data shows seven periods, regardless of holidays. See the F1 help file for more information.

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How to perform dynamic sorting in MarketWatch

Right-click | PROPERTIES | MARKETWATCH | RANK | AUTORANK

Check 'enable' and select your field. This can then be saved as a template for future lists.

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Athena

Function keys in Athena

While viewing an Athena chart, try pressing a function key e.g. F1. Functions can be assigned to perform an operation on the chart.

To see the defaults or make your own assignments:

Right-click on Athena workspace | **PROPERTIES** | **ATHENA** | **KEYMAPPING**.

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The 'lock' symbol in Athena

The lock symbol in the bottom right corner is a Auto-tracking Off notification. If you change the X Axis focus of the chart, to look at past data for example, new data will be suspended (the lock symbol is present). To return to active mode, select 'Snap To Auto Tracking' from the Athena toolbar.

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How to access the Athena Expert

Even though it's documented in the F1 help file, the feature is not enabled for use.

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How to add a level line (and other chart indicators) in Athena

Note: This is an unsupported feature of QC Athena.

1. Select 'add level line' on the toolbar
2. Left-click on the chart where you want the line
3. Right-click **Undo add marker**
4. Right-click **Redo add marker...**
Presto, the line will appear!
5. Right-click line as usual to set properties
Don't forget to turn off drawing mode

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How to add a pane that shows the volume in Athena

Right-click | **Add Price Display...**

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How to add chart studies in Athena

1. Right-click on the chart to bring up the menu
2. Select **Add Analysis...**
3. Choose type of study and which pane to locate study using the **Option** buttons
4. Click the **Next** button
5. Modify study properties, if required.
6. Click **Finish** to draw the chart

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NewsWatch

Menu commands in NewsWatch

To bring up a list of NewsWatch commands, type a backslash '\' to bring up a dialog box for entering commands.

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Semi-automatic updates in NewsWatch

Create your own list in MarketWatch

1. Press the link button on the tool bar
2. Left click anywhere from within MarketWatch and drag the cursor into NewsWatch
3. Now, to see dynamic news related to one of your symbols, just double-click the symbol.

Note: Still searching for a way to do this with an entire list of symbols...

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How to search for news stories in NewsWatch

Within the NewsWatch, right-click and select **Search Wizard** to show the Search dialog.

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Search by symbol in NewsWatch

Click the **Symbols** button and enter a symbol or enter multiple symbols in the Include/Exclude columns or click the Symbol List button to select a saved list.

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Search by keyword in NewsWatch

To narrow a search to include or exclude keywords or phrases, click on the **Keywords** button and enter text in the Search String edit box. If you want to add more than one keyword, use the following Boolean operators - and or not. Use the asterisk (*) as a wildcard. For complete phrases use 'quotes' around the phrase.

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Search by source in NewsWatch

1. Click on **Wires/Cats...**
2. Double click on a source to show categories within the source
3. Click a category, then >> button to search by a specific category
4. Click **OK**
5. Click **Search** to begin search. The latest 50 stories will be retrieved. The number of stories retrieved can be changed using the box in the lower left corner of the dialog box. After your stories are returned – to retrieve more, right-click and select **Get next batch**.

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Selecting which NewsWatch wire services are displayed

The feature is not enabled for use... yet?

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Saving fixed NewsWatch stories for quick retrieval

To set the default news story popup:

1. Load the news story e.g., 01301 (corporate earnings calendar);
2. Right-click the news story title bar and select SAVE AS DEFAULT;
3. Retrieve using VIEW | POPUP CONTROLS | NEWS STORY.

To create a dedicated news story workspace:

1. FILE | NEW SPLITTER WORKSPACE
2. EDIT | ADD DISPLAY | NEWS STORY | OK
3. Right-click on the workspace and select STORY NUMBER...
4. Using the example above, type in 01301 | OK
5. FILE | SAVE AS | type in the workspace name here
6. FILE | SAVE WORKBOOK

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Portfolio

How to populate a Quote Center Portfolio

Method 1:

You cannot link MarketWatch to Portfolio, but you can select MarketWatch entries (including labels/headers) by holding down the shift or ctrl key while left-clicking the mouse and then DRAG SELECTIONS into Portfolio. A copy will be created of all the symbols.

Method 2:

1. Right click | Insert Group
2. Fill in name and desc. and click **OK**
3. Double click on the name (Internal Code)
4. Right Click | **Insert Symbol**
5. Fill-in the blanks (for short trades enter a negative number of shares)
Can also right click and insert totals

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How to keep track of the time that a security is held in the Quote Center Portfolio

No known method...

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Ticker

How to adjust the scroll speed of the Quote Center Ticker symbols

Indirectly, look at the settings under 'filter options'. The more strict the exclusions, the fewer the updates you will receive.

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What are the scrolling steps in Quote Center Ticker properties?

Pending...

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Analytics

How to bring up the Quote Center Analytics menu

From the Analytics command line, use the bracket key to bring up the Analytics menu e.g., 'menu'

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Retrieving Quote Center historical fundamentals

A compendium of fundamental data and valuation ratios on companies are available through MetaStock Quote Center. Using the Reuters Navigator, double-click on the Fundamental/ Performance Analysis folder. Select from company fundamentals pages such as Earnings Estimates Analysis, Institutional Holdings, Insider Trading Summary, Annual & Quarterly Balance Sheet and Income Statements, Financial ratios, Liquidity ratios, etc. Additionally, this data is available by double clicking on data fields throughout the system. A list of these Hot Links fields is provided in the appendix of this guide. You can also get historical fundamental information by going into the Analytics window. This is a great resource for technicals, fundamentals, mutual fund history, bonds, etc. If you want to look at the historical fundamental information you would open a analytics window. You then simply type what symbol you want to look at. For example; bby (For best buy) and /f for fundamentals. So it would look like this bby/f. With the great historical information you can go back further than the 4 years displayed. You would simply put bby/f/dat2000 or whatever date you want to be the first year displayed. You can go back as far as there is data available. This screen shows Revenue, EPS and DIV information.

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Tracking mutual fund performance in Quote Center

I know you wouldn't expect a whole lot about mutual funds in a real-time product but, there is a lot of great information about them in QC. If you go into the Analytics screen you can get access to a lot of information there. You can get info like Beta, R Squared, Load or No Load, and admin costs.

If you open a new screen and want to look at mutual fund information then go to 'fund symbol/fnd' and you will get total return info and how the money is spread out amongst the fund; e.g., 92% equity and 8% cash.

A practical example:

- Pick a mutual fund such as: fgrix/fnd
- To see holdings of the fund: symbol/fnd/hld
- To see administrative information of the fund: symbol/fnd/adm
- To see contact information: symbol/fnd/add

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ZoomDynaQ

What is ZoomDynaQ?

ZoomDynaQ is the display that gets Level II data.

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Misc

How does eSignal data compare to Quote Center data?

Fundamentals

Quote Center has extensive fundamental and market data-- including items such as Financial Statements, Earnings Analysis, Index Membership, Corporate Actions, Dividend, Revenue & Earnings per Share information going back 5 years

eSignal has VERY limited fundamental data. There are basics such as PE ratios, but they do not offer access to Financial Statements or the other in-depth analysis and information that Quote Center offers.

History

Tick Quote Center - 30 days eSignal - 10 days

IntraDay Quote Center - 250 days eSignal - 180 days

Daily Quote Center - 20+ years eSignal - 10 years

Fundamental Quote Center - 23 years eSignal - limited

Quote Screens

Quote Center's Quote Screen, called MarketWatch has 700 data fields. You can get information as detailed as:

- Shares outstanding less insider controlled, treasury, and 5% owners
- Analyst comment lines 1, 2 & 3
- Capital expenditures for recently reported quarter
- EBITDA (earnings before interest, taxes, depreciation & amortization)
- Foreign exchange effects for recently reported quarter
- Insider buy & sell transactions
- Institutional shares bought/sold during preceding quarter
- MACD Spread
- Market Maker: 1
- Near 52 week high./low
- Number of employees
- Price to Book Value
- Tax rate: 5 year average

eSignal only has 110 data fields that do not go into the detail that is offered with Quote Center.

News

Quote Center offers the most comprehensive real-time news package available in the retail space. Quote Center comes standard with:

- PR Newswire & Businesswire
- Reuters Top News (not available with eSignal)

Available at an additional cost (not available with eSignal):

- Reuters North American Securities News (\$65/month)-- there is 3 years of history on this news. This service offers breaking news and analysis of the 1,500 largest US companies, accounting for more than 80% of US market capitalization and covers another 1,000 companies depending on market conditions.
- National News Services (\$45/month)-- these proprietary local language services help you make money by providing detailed news coverage of a country or region's companies, financial markets, macroeconomic indicators and government policy. It provides market-moving scoops and exclusives on companies, governments and markets written by local journalists with years of experience covering their subject and deep local knowledge.

eSignal offers in terms of news (all at an additional charge):

- Dow Jones News (\$115/month)
- PR Newswire (\$5/month)
- Fly on the Wall (\$25/month)

FOREX

Quote Center Forex data is included with all packages. There are templates and trading systems designed specifically for currency trading in MS Pro 9.1 & MS Pro FX. There is also a custom designed Forex workspace in the Quote Center program. There are roughly 800 banks that contribute to the FX quotes that are fed through Quote Center's datafeed.

eSignal charges an additional \$50 a month for Forex data, making the eSignal package with Forex data \$165/month. Quote Center with Forex data is still \$135/month. eSignal only has 194 contributing banks. There are no FX specific systems offered by eSignal.

Active Symbols

Quote Center comes with 500 active symbols; the upgrade to 1,000 is \$50/month. eSignal basic comes with only 200 active symbols. eSignal upgrades are available at the following prices:

- 500: + \$50
- 1000: + \$50
- 2500: + \$50

Dynamic Data Exchange (DDE)

All 700 data fields available in Quote Center can be transferred directly to Excel where they will update in real-time.

List Management

Quote Center has incredible list management and access to extensive real-time ranking lists, including:

- Dollar Gainers
- Dollar Losers
- Money Flow Gainers
- Non Block Tick Volume Gainers
- Non Block Tick Volume Losers
- Percent Gainers
- Percent Losers
- Selected Percent Gainers
- Selected Percent Losers
- Tick Volume Gainers
- Tick Volume Losers
- Volume Gainers
- Volume Losers

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How to edit and create forms in Quote Center

In the C:\Program Files\Equis\QuoteCenter\FormDisplay Templates folder, you can open one of the .bfl files. You can look at one and hopefully see the layout. A ' > ' is a space...

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