

**** If you do not use or view Sector and Industry data and don't intend to, you do not need to worry about this change and can disregard this announcement. If you do use Sector and Industry data or intend to start using it in the future, you will want to read through the following information. ****

Updating to the new S&P Sectors and Industries Solution

Frequently Asked Questions

Updating your Reuters DataLink folder

Updating your Local Data folder

Updating Custom Layouts and Saved Charts

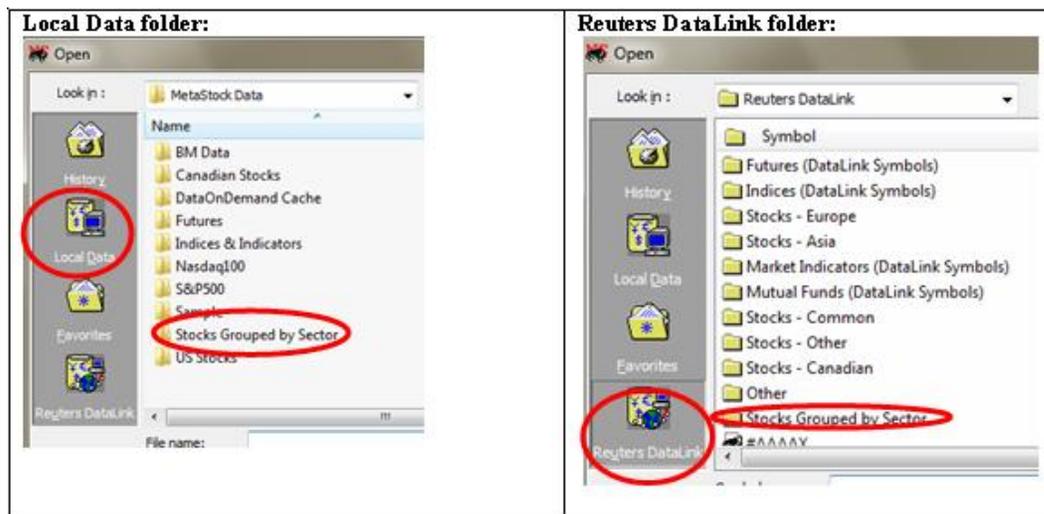
Frequently Asked Questions

What are the Sectors and Industries?

The sectors and industries are groupings of securities according to different market sectors or industries. Rather than customers having to create custom folders with their own selected securities, the S&P provides pre-grouped securities affiliated with a particular sector or industry, making it easier to compare a specific market. For example, you would find Microsoft Corporation in the Software sector.

Where are the Sectors and Industries within MetaStock?

The sectors and industries folders appear within the Open dialog within MetaStock. There are two different locations within the Open dialog: in the Reuters DataLink folder and the Local Data folder.



How does this change affect me?

- Within the Local Data folder:
 - The old folder (Stocks Grouped by Sector) and its corresponding index symbols (.RR- symbols) will remain in your Local Data folder; however after April 5, 2009, those securities will no longer be updated.
 - If you only view those securities, you will want to discontinue viewing the securities in that folder and instead use securities in the new Stocks by Sector S&P folder.

- If you use any custom layouts or charts based on securities within the old Stocks Grouped by Sector folder, you will need to create new ones using the new Stocks by Sector S&P folder. See below for instructions.
- Within the Reuters DataLink folder:
 - If you update the symbol database anytime after February 5, 2009, the new sector and industry GICS solution will replace the older Reuters solution in the Stocks Grouped by Sector folder
 - The old .RR- index symbols will still be available within the Reuters DataLink folder and will continue to receive data updates through April 5th.
 - It is very important to note that after April 5, 2009, the .RR- symbols will no longer receive data. So, if you do use the .RR- symbols for sector and industry data, you will need to switch over to the GICS by April 5, 2009.

How do I add the new GICS securities to my Local Data folder?

In order for the new GICS solution to appear in your Local Data folder, you will need to download and run the February 6th (or subsequent) symbol utility. See below for instructions.

How do I view the new GICS securities in my Reuters DataLink button?

In order to see the new securities in the Stocks Grouped by Sector folder within the Reuters DataLink button, you will need to update the Symbol Database. See below for instructions.

What if I don't download the new symbol utility before April 6th?

- If you don't download the new symbol utility before April 6th, nothing will happen. The new solution won't be available to you until it is installed.
- On April 6th, we will be shutting off the data from the older Sectors and Industries solution. Therefore, any access or link you have created to this data will return a chart but the data will no longer be updated. If this occurs, you only need to download the Reuters DataLink symbol utility file and the updated folder will be installed. If you have any links to the old data, you will need to re-create them using the new data. See below (Updating Custom Layouts and Save Charts) for instructions.

What if I don't download the new symbol database before April 6th?

- On April 6th, we will be shutting off the data from the older Sectors and Industries solution. Therefore, any access or link you have created to this data will return an Invalid Symbol message. If this occurs, you only need to update the Symbol Database and the updated folder will be installed.

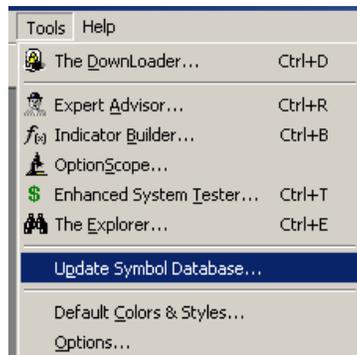
Will this affect my custom layout and saved charts?

- If you are linking to the older Sectors and Industries data, then YES, this will affect your custom layouts and save charts. If you are not linking to this data, it will not. For a complete set of instructions on what to do with affected custom layouts and saved charts, please read below.
- If your custom layouts and/or saved charts link to the .RR- symbols within the Reuters DataLink folder, you will need to re-map them. Please see below for instructions on how to do that.

Updating your Reuters DataLink folder

To update the symbol database with the new S&P GICS Sector indices symbols:

1. Open MetaStock
2. Select Tools and Update Symbol Database



3. A message will appear that says "Patch Successful."
4. To complete the update process, close and re-open MetaStock and the DownLoader.

***running this step prior to updating any custom layouts or charts that reference the Data On Demand data will not hurt anything because the older data/securities will still be available. Please note that if you don't update your custom layouts and saved charts before April 6, 2009, those custom layouts and charts will no longer receive updated data. See Updating Custom Layouts and Saved Charts below.*

Updating your Local Data folder

To add the new S&P Indices solution to the Local Data folder:

Download and install the Reuters DataLink symbol utility file

Before starting, we highly recommend you review the training video on how to back up your custom items. This video also includes step by step instructions on how to install the Reuters DataLink Symbol Utility that includes the new S&P GICS index symbols and sector stock groupings. Please [click here](#) to start the video.

1. To update the symbol utility file:
 - Click onto the link below or copy and paste the link into an internet browser: <http://www.equis.com/customer/support/download/symbolutility.aspx>
 - Make sure you're looking at the **Reuters DataLink North American Symbol Utility** section!
 - Once you have read the warnings and checked the "I understand the warning" select the "Download RDL file" button.
 - When prompted, select "Run". When the installation is complete close the file download window.

Downloading prices for the new Stocks by Sectors S&P (you must update the Reuters DataLink symbol utility prior to this step):

1. Open the DownLoader
2. Choose Tools | Download Prices
3. This will bring up the Select Securities dialog box.

4. On the left side of this dialog, browse to the “Stocks by Sectors S&P” folder and select it. In the middle of this dialog, click the “Add All Subfolders” button.
5. Again, on the left side of this dialog, browse to the Indices & Indicators folder, highlight the “Sector & Industries S&P” folder, and click the “Add” button.
6. All of the folders and subfolders for which you’ll want to collect data are now moved to the right side. Click OK.
7. The Vendor Selection dialog box will open. Be sure that the Reuters DataLink tab is selected, the “Automatic stock split” option is checked, and the Ending date has today's date.
8. Click OK.
9. The data collection will now run.

Updating Custom Layouts and Saved Charts

Backing up custom layouts and saved charts that reference the old Sectors and Indices (.RRs)

1. Open MetaStock – select File | Open, and then set your ‘files of type’ (at the bottom of the window) to either layouts or charts depending on what you want to back up.
2. From the list of files, select the layout or saved chart that references the Sector & Industries (.RR) index symbols and select Open.
3. Next select File | Save As – set the ‘Save as type’ (at the bottom of the window) to “Template”.
4. Within the ‘File Name’ section, enter in the name you want for the template and click Save.
5. Repeat the above steps with each of the layouts and/or charts that you have referencing the old .RRs.

Re-building custom layouts to use the new S&P GICS Sector indices

1. Open MetaStock – select File | Open.
2. In the top right hand corner of the Open window select Options | Open with Template.
3. Highlight the custom template created in Step 4 of the “Backing up custom layouts and saved charts”, and select Open.
4. This will return you to the Open window.

For Local Data:

- a. Select the Local Data button from the left hand side of the Open window.
- b. Using the “Look in” at the top of the Open window, select the “Sectors & Industries S&P” folder and click Open. The new S&P GICS sector index symbols will now be displayed.
- c. Highlight the symbol you’d like to assign to this layout, and click the Open button. The new S&P GICS index symbol will now be opened with your custom template.

For Data on Demand:

- a. Select the Reuters DataLink (or QuoteCenter for Pro users) button from the left hand side of the Open window.
 - b. Type or select the desired index symbol and click the Open button. The new S&P GICS index symbol will now be opened with your custom template.
5. The final step is to save and name the “Layout”. Select File | Save As – make sure the ‘Save as type’ (at the bottom of the screen) is set to Layouts. Give it a name in the File name section, or to over-write the existing layout, highlight the layout name from the list and select Save. Select Yes to the over-write prompt.

Re-building saved charts to use the new S&P GICS Sector indices

1. Open MetaStock – select File | Open.
2. In the top right hand corner of the Open window select Options | Open with Template.
3. Highlight the custom template created in Step 4 of the “Backing up custom layouts and saved charts” and select Open.
4. This will return you to the Open window

For Local Data:

- a. Select the Local Data button from the left hand side of the Open window.
- b. Using the “Look in” at the top of the Open window, select the “Sectors & Industries S&P” folder and click Open. The new S&P GICS sector index symbols will now be displayed.
- c. Highlight the symbol you’d like to assign to this chart, and click the Open button. The new S&P GICS index symbol will now be opened with your custom template.

For Data on Demand:

- a. Select the Reuters DataLink (or QuoteCenter for Pro users) button from the left hand side of the Open window.
 - b. Type or select the desired index symbol and click the Open button. The new S&P GICS index symbol will now be opened with your custom template.
5. The final step is to save and name the “Chart”. Select File | Save As – make sure the ‘Save as type’ (at the bottom of the screen) is set to Charts. Give it a name in the File name section, or to over-write the existing chart, highlight the chart name from the list and select Save. Select Yes to the over-write prompt.