



Getting Started with  
**Barchart's Advanced  
Equities Service**

June 2007

# Getting Started with Barchart's Advanced Equities Service

Welcome to Barchart's Advanced Equities Service. To help you get the most out of your free two week trial, this document will highlight some of the key features and benefits to your subscription.

- 1 One of the first thing you should notice is the absence of all advertising on the site. Aside from providing fewer distractions when you are viewing the information, the removal of the advertising banners also provides more space to view the content.

## 2 Signals Guide

Found on the Signals tab, the **Signals Guide** is a daily guide of today's Technical Opinions.

Before we go farther, it's vital to understand: "**What are Technical Opinions?**"

Unique to Barchart.com, the Signals tab and all pages contained within are derived from the results and technical analysis of the Technical Opinions program.

The Technical Opinions program takes up to 2 years worth of historical data on equities symbols and runs these prices through thirteen different popular technical indicators. After each calculation, the program assigns a **buy, sell or hold** value with the study, depending on where the price lies in reference to the common interpretation of the study. For example, if the price is above the moving average of the stock, then this is generally considered an upward trend or a buy.

The Barchart Advanced Equities Service provides you invaluable information with Signals. You'll have access to:

- **Snapshots:** opinions on a daily, weekly and monthly basis
- **Advanced Opinions:** market-timing information that calculates and interprets signal strength and direction, and
- **Performance Analysis:** back testing of each study used within the opinions, and calculation of a performance history of every buy and sell signal generated by each of the thirteen studies in the past two years with dates, trades, prices, profit and loss, and open-trade equity.

*The Technical Opinions program is run once a day, and you'll find the Signals pages on the subscription site updated daily at 6 p.m. EST after the close of the market with new, current data.*

### Take a look at the Signals Guide:

The Signals Guide considers all stocks that traded that day on the NYSE, AMEX and NASDAQ exchanges, with a daily closing price between \$2 and \$900 and a daily volume of at least 10,000 shares. To be included within the signals pages, the underlying stock must have at least six months' worth of trading history.

Signals Guide for May 14			
Overall Opinion		100 % Buys	100 % Sells
Total number of stocks		166 Stocks	102 Stocks
Today's New Indicators		Buys	Holds
Composite Indicators			
TrendSpotter (TM)		51 Stocks	164 Stocks
Short Term Indicators			
7 Day Directional Indicator		336 Stocks	2 Stocks
10 - 8 Moving Average Hilo Channel		228 Stocks	747 Stocks
Price vs. 20 Day Moving Average		177 Stocks	44 Stocks
20 - 50 Day MACD Oscillator		32 Stocks	32 Stocks
20 Day Bollinger Bands		134 Stocks	308 Stocks
Medium Term Indicators			
40 Day Commodity Channel Index		203 Stocks	296 Stocks
Price vs. 50 Day Moving Average		89 Stocks	31 Stocks
20 - 100 Day MACD Oscillator		27 Stocks	16 Stocks
50 Day Parabolic Time/Price		198 Stocks	9 Stocks
Long Term Indicators			
60 Day Commodity Channel Index		151 Stocks	234 Stocks
Price vs. 100 Day Moving Average		67 Stocks	13 Stocks
50 - 100 Day MACD Oscillator		64 Stocks	22 Stocks

The first section, labeled "**Overall Opinion**", lists the stocks that are at a 100% buy or a 100% sell rating. The second section, labeled "**Today's New Indicators**", contains the listing of stocks whose indicators have changed to a new buy, sell or hold from the previous trading day.

Each of these lists have a subset of stocks, which can be accessed by clicking on the link. Once you've displayed a subset, you can download the data to a file for use in **Excel**, or click the **FlipCharts** link to view each of the symbols sequentially on a pop-up chart.

7 Day Directional Indicator - Today's New Buys Ranked 1 - 25, for May 14								
Symbol	Company Name	Exch	Last	Change	Short Term Average	Med. Term Average	Long Term Average	Overall Opinion
<a href="#">ABXA</a>	ABX AIR INC	NASD	6.70	+0.07	40% Buy	25% Sell	66% Sell	16% Sell
<a href="#">ADBE</a>	ADOBE SYSTEMS INC	NASD	41.81	+0.11	40% Buy	25% Buy	66% Buy	32% Buy
<a href="#">ADLR</a>	ADOLOR CORP	NASD	3.91	+0.04	40% Buy	75% Sell	66% Sell	32% Sell
<a href="#">ADTN</a>	ADTRAN INC	NASD	25.98	-0.08	20% Buy	25% Buy	66% Buy	40% Buy

### About the Composite Indicator, TrendSpotter™

TrendSpotter™ is a computerized trend analysis system, developed by Barchart.com. The system uses a combination of wave theory, market momentum and volatility in an attempt to find a general trend for a specific market. TrendSpotter™ attempts to cut losers early and let winners run.

A graphical interpretation of TrendSpotter™ can be viewed using the Custom Charts. When there is a single dot above the price, this is a resistance point and represents a bearish trend. When there is a single dot below the price, this is a support point and represents a bullish trend. When there are 2 dots, one above and one below the price, this represents a neutral or hold trend. When a trend exits either a bullish or bearish trend, the trend is forced as a neutral trend for at least one day.

You can find more information on the calculations that go into assigning the buy/hold/sell signals that make up the **Signals Guide** in the [Support section](#) of the subscription site.

### 3 Signals Search

The Signals Search feature will allow you to search through the proprietary Barchart Signals database for stocks that meet your requirements. You can search through any of the fields from the **Technical Opinions**, including the indicators ratings, short-, medium- and long-term signals, and overall results to give you a customized results list.

The Signals Search database is restricted to stocks whose price is greater than \$2.00 and less than \$900.00, and whose daily volume is above 10,000.

We display the results of your search along with the price, short-term, medium-term, long-term and overall opinion rating.

Each search result allows you to download the data to a file for use in **Excel**, or click the **FlipCharts** link to view each of the symbols sequentially on a pop-up chart.

Signals Search Results - Found 12 entries for May 14  
Displaying 1 - 12

[Excel File](#) [FlipCharts](#)

You searched for:

- Price is above 5
- Price is below 5.25
- Price vs. 20 Day Moving Average indicates Buy

Symbol	Price	Short Term Average	Med. Term Average	Long Term Average	Overall Opinion
<a href="#">AMPL</a>	5.13	80% Buy	100% Buy	33% Buy	80% Buy
<a href="#">ARIA</a>	5.13	80% Buy	50% Buy	33% Buy	64% Buy
<a href="#">CAMD</a>	5.15	80% Buy	100% Buy	100% Buy	96% Buy
<a href="#">CORI</a>	5.06	80% Buy	50% Buy	100% Buy	80% Buy
<a href="#">CUP</a>	5.10	80% Buy	100% Buy	100% Buy	96% Buy
<a href="#">ENT</a>	5.23	20% Buy	25% Sell	67% Sell	24% Sell
<a href="#">HYF</a>	5.20	100% Buy	100% Buy	100% Buy	100% Buy
<a href="#">NETM</a>	5.10	40% Buy	Hold	67% Sell	Hold
<a href="#">RFMI</a>	5.01	40% Buy	75% Buy	67% Buy	64% Buy
<a href="#">ROAC</a>	5.09	20% Buy	100% Buy	67% Buy	64% Buy
<a href="#">WHI</a>	5.16	20% Buy	25% Buy	67% Sell	8% Buy

*The Signals database is updated once a day at 6 p.m. EST after the close of the market with new, current data.*

### 4 Chart Builder™

This subscription feature, found on the **My Quotes** tab, allows you to create your own portfolio of your favorite charts for convenient one-click access. View one chart, or view all of your saved charts at the same time.

Chart Builder™ has the same features as Custom Charts (available on the free website) with the added ability to arrange lists of charts, create and apply custom chart styles, open all charts in separate browser windows at one time, and more.

## Creating a New Chart with Chart Builder™

The first time you access Chart Builder, you'll see a welcome page with some important information about pop-up blockers. Please read this information carefully, and if you have any problems with Chart Builder, don't hesitate to contact our Support Team at (312) 554-8122 or email us at [aes@barchart.com](mailto:aes@barchart.com).

Creating a new chart in Chart Builder is identical to creating a chart in Custom Charts. First, click the "Create Custom Chart" button found at the top of your screen:



You'll be asked to enter your chart settings, as shown below. Under **Chart Name**, make sure you enter an identification for the chart (each chart you create must have a unique name) – you'll see why this is important in a moment:

Symbol	Size	Scale
GOOG	864 by 504	Linear Scale
Time: One Year		Frequency: Daily Chart
Prices On	<input checked="" type="checkbox"/> Latest Date <input type="checkbox"/> Dividend Adjust <input type="checkbox"/> Grids On	<input type="checkbox"/> Volume On <input checked="" type="checkbox"/> Events On <input checked="" type="checkbox"/> Fine Lines
Chart Name: Google	Compare to:	Save Chart Reset
Studies Support		(Parameters)
Primary Study:	Barchart OHLC	
Primary Overlay:		
Secondary Study:	Bollinger Bands - 20, 2	
Secondary Overlay:	Relative Strength - 14	21

After you have selected your chart settings, click the **Save Chart** button.

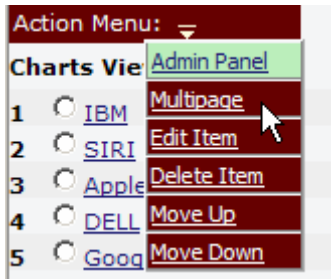
## Viewing your Charts

Look at the left side of your browser window. You'll see an **Action Menu** with the names of all the charts you've built. To view a chart, simply click on your chart name:

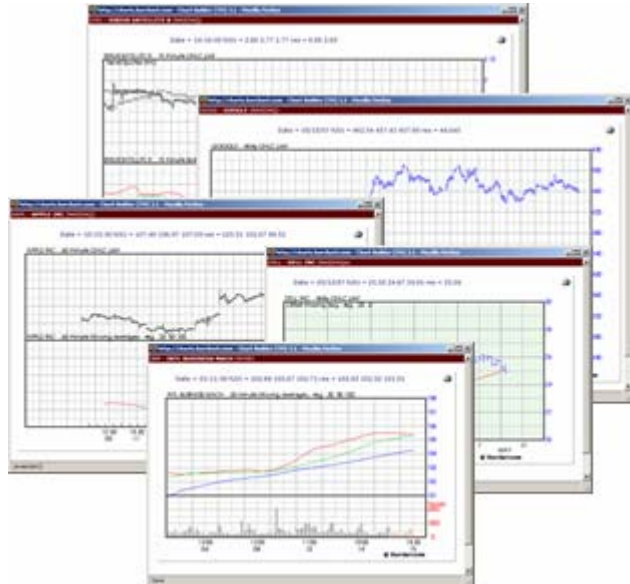


In the example shown above, there are 5 charts saved. Let's say you want to view ALL of these charts.

Put your cursor over the down arrow (just to the right of the words "Action Menu"). A new menu will be displayed:

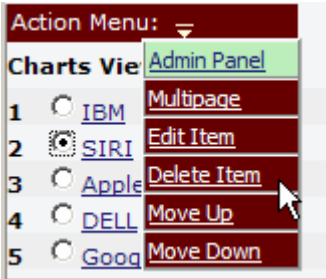


Click **Multipage**, and all of your charts will be displayed in separate windows. This allows you to quickly page through them:



## Deleting Charts

To delete a chart from the Action Menu, click the radio button to the left of the chart name. Put your cursor over the down arrow (just to the right of the words "Action Menu"). A new menu will be displayed. Select **Delete Item**. You'll be asked to confirm the deletion of the chart.

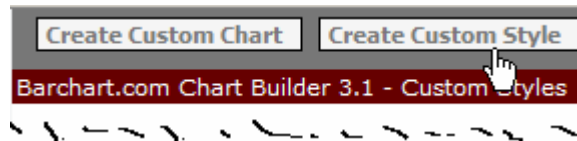


## 5 Custom Chart Styles with Chart Builder™

If you're like some traders we know, you may have a preference to view certain styles of charts again and again: a Weekly Bar chart with a MACD; a Daily Candlestick chart with Bollinger Bands, etc.

Chart Builder allows you to create your own custom chart styles, and apply one to any future chart you decide to create. This saves you time, as you won't have to set up every chart with the same settings over and over again.

First, click the "Create Custom Style" button found at the top of your screen:



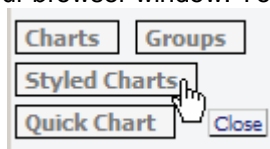
You'll be asked to enter your style settings, as shown below. Under **Style Name**, make sure you enter an identification for this chart style (each style you create must have a unique name).

When you're done, click **Save Style**.

Style Name	Size	Scale
Candles	864 by 504	Linear Scale
Time: One Year		Frequency: Daily Chart
Prices On	<input checked="" type="checkbox"/> Latest Date	<input type="checkbox"/> Dividend Adjust
	<input type="checkbox"/> Volume On	<input type="checkbox"/> Events On
		<input type="checkbox"/> Grids On
		<input checked="" type="checkbox"/> Fine Lines
Save Style		Reset
Studies Support	(Parameters)	
Primary Study:	Candlestick Chart	
Primary Overlay:	Bollinger Bands - 20, 2	
Secondary Study:		
Secondary Overlay:		

### To Apply a Style to a New Chart

Look at the very bottom left of your browser window. You'll see a group of buttons like these:



Click **Styled Charts**.

You'll now see the **Action Menu** change to the **Custom Styled Charts** menu. Enter the symbol you wish to create the chart for, a Name for the chart, and choose the style to apply from the drop-down menu.

**Custom Styled Chart:**

**Enter Symbol:**  
YHOO

**Enter Name:**  
Yahoo

**Choose Style:**  
Candles

Apply    Reset

Click **Apply**, and the new chart will be added to the Action Menu using the style you've chosen.

## 6 Chart Preferences

The Advanced Equities Subscription site also allows you to save time by keeping a site-wide **Chart Preference** for you. This preference setting will apply to **ALL other charts** you create on the subscription site. Once set, every chart will be customized to your settings.

### To Set Chart Preferences:

1. Open the **My Quotes** tab.
2. Choose **Chart Preferences** (found under **Custom Tools** in the left navigation bar).
3. To set preferences, choose the Data Frequency, Options, Studies and Overlays from the chart form, then click **Set Preferences**.

Data:		Options:		
Frequency:	<input type="text" value="Daily Chart"/>	Size:	<input type="text" value="720 by 432"/>	
Time:	<input type="text" value="One Year"/>	Scale:	<input type="text" value="Linear"/>	
<input checked="" type="checkbox"/> Prices On <input checked="" type="checkbox"/> Volume On <input checked="" type="checkbox"/> Dividend Adj. <input checked="" type="checkbox"/> Events On <input type="checkbox"/> Grids On <input checked="" type="checkbox"/> Fine Lines				
Primary Study	<input type="text" value="Barchart OHLC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Overlay	<input type="text" value="Bollinger Bands - 20, 2"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secondary Study	<input type="text" value="Accumulation/Distribution"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overlay	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Set Preferences"/>				
<input type="button" value="Clear Preferences"/>				

### To Clear a Previously Saved Preference:

1. Open the **My Quotes** tab.
2. Choose **Chart Preferences** (found under **Custom Tools** in the left navigation bar).
3. Click the **Clear Preferences** button.

## 7 Quote Screeners

Your subscription to Barchart Advanced Equities Service comes with two unique groups of quote screeners: the **Fundamental Quote Screener** and the **Technical Quote Screener**. These tools give you the ability to search for and identify stocks that may satisfy your investing needs.

**"Fundamentals"** refer to any data *besides the actual trading pattern of the stock* that may have an impact on its price or value.

When you perform a **Fundamental Quotes Search** with the Advanced Equities Service, you will be able to look for stocks based on their **Price, Volume Data, Income Statement,**

**Balance Sheet, Ratios, Quarterly Performance**, and other vital statistics.

**“Technical”** refer to analysis of the trading and price history of a stock, mutual fund, or futures contract. Remember the **Signals Guide** and **Signals Search** (covered on pages 2-4 of this guide)? You learned about Barchart.com’s proprietary **Technical Opinions program**, which takes up to 2 years worth of historical data on symbols and runs these prices through thirteen different popular technical indicators.

When you perform a **Technical Quotes Search** with the Advanced Equities Service, you will be able to look for symbols based on their **Signal Strength or Direction Rating**, or the value assigned by widely-used technical indicators.

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#### **The Fundamental Quotes Screener:**

Search our extensive database of stocks, using over 100 fundamental parameters such as price, price earnings, quarterly and yearly high and low prices, relative strength and historical volatility.

Like what you’ve found in your search? Save your search result for easier and faster viewing, or refine it with additional search parameters and try again.

#### **The Technical Quotes Screener:**

Search for stocks, mutual funds, or commodities contracts using the results of the Technical Opinions found on the site. Each search provides you with the ability to sift through our extensive database using numerous technical indicators such as Weighted Alpha, Stochastic %K, Stochastic %D, Relative Strength, and Percent R.

You may also search for symbols meeting your **Price and Performance** objectives, such as Volume, Weighted Alpha, Overall Opinion, Signal Strength Rating, and Signal Direction Rating.

Each search result can be saved for easier and faster viewing; it can be also updated, and deleted.

*Please note Barchart.com does not trade. We are not a trading firm and we are not advising you to make any trades. The information listed on the Advanced Equities Subscription site (such as the Signals Guide) is simply the common interpretation of the results of popular technical analytics.*