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1. Reports overview



The comprehensive information produced by TradingExpert Pro is automatically consolidated into concise reports that can be quickly examined. In this chapter, you will find an explanation of all the reports available. You will learn how to customize the screening of your data base to suit your trading style.

Explanation of the Reports window

When you open the **Reports** application, you see a large window which is divided into three panels. Initially, the panel on the left contains a list of the TradingExpert Pro report categories and the two panels on the right are blank. When a report is selected, the report title is displayed in the upper right panel and the report information appears in the panel below.

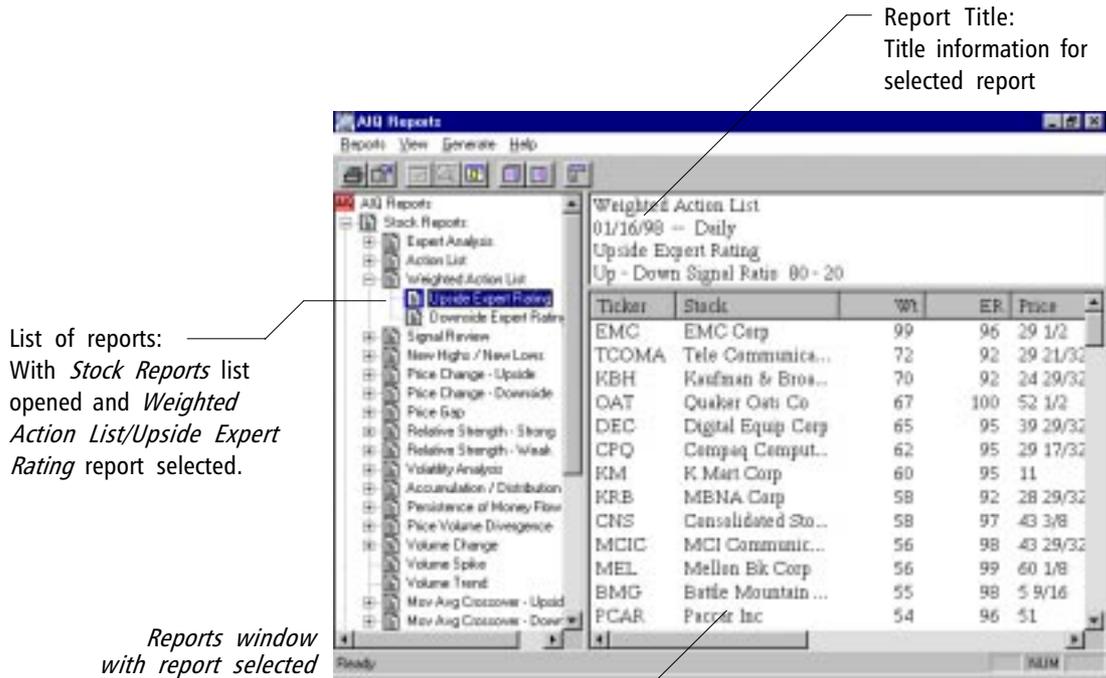
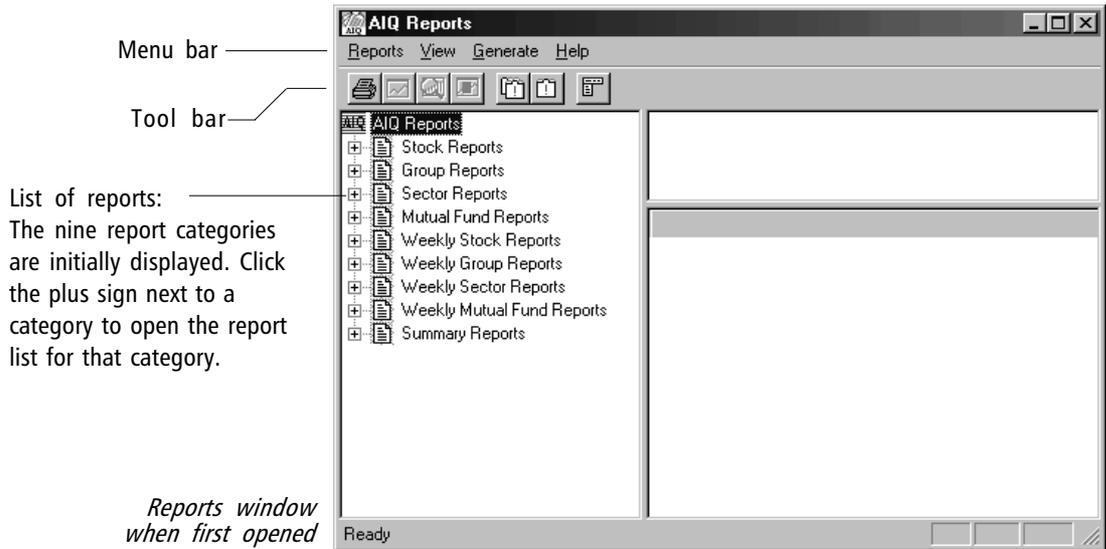
The list in the left panel is used for selecting reports for viewing and printing. The selection procedure is similar to selecting a folder in the Windows Explorer function. The list is displayed in a hierarchical structure (similar to the way that folders are listed in the left panel of the Windows Explorer). Only the top level (the nine basic report categories) is visible initially. Sublevels are displayed by clicking on the plus signs within the small boxes to the left of the report category names.

When you click on a category, the list expands to display all of the reports available within that category. To view a report, you simply click on the report icon next to its name. Most report categories are further divided into subcategories and you must choose a subcategory before you can select an actual report.

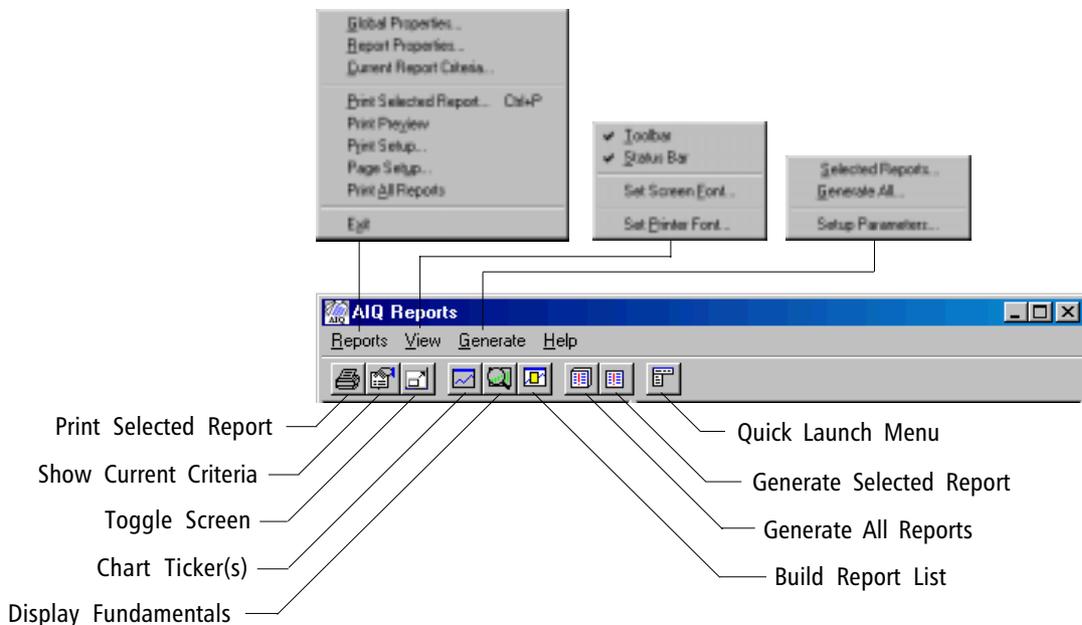
Before a report can be viewed, it must first be generated (i.e., report data computed and sorted). You can at any time generate reports for the current date or for any date for which you have sufficient historical data. The best way to insure that the reports you need are always available is to specify in **Data Retrieval** that reports be generated after every update.

Note

To exit from the **Reports** application, press the **Alt + F4** keys, or click the **close box** in the upper right corner of the Reports window.



Reports Menus and Toolbar



Features of AIQ Reports

AIQ TradingExpert Pro produces a variety of time-saving reports to help you screen your data so that you can find securities that are the best candidates for trading. Stock reports, such as the Expert Analysis report and two Action Lists, flag the securities in your data base that you should consider for trading. Group and Sector reports identify group/sector rotation and help you to determine leading and lagging groups and sectors. Mutual fund reports allow you to judge and compare the performance of the mutual funds you are tracking.

- Some of the features of the AIQ reports include:
- In addition to alerting you to up or down signals generated by the AIQ expert system, reports will alert you to critical price, volume, and trend changes.
- Most of the reports are available in both daily and weekly versions. Weekly reports are automatically generated at the end of the week - on whatever day the week happens to end. Normally, weekly reports are generated after Friday's update.

- Scanning capabilities include:
 - You can specify as the source of reports the tickers in your entire data base, or limit scanning to individual lists.
 - You can set maximum and minimum price limits.
 - You can specify the minimum volume for the tickers you want evaluated.
- Criteria for each report can be adjusted for personal preference. You can enter time periods, minimum values for Expert Rating signals, etc., to suit your trading style. You can change the criteria of a report and, after the report is generated with the new data, view the effect of the changes.
- A different set of scanning limits and criteria values can be entered for weekly and for daily reports.
- AIQ's computerized Market Log, a two-report consolidation of information drawn from many reports and functions of TradingExpert Pro, can be used for tracking market direction and sector rotation.
- Most reports include AIQ's unique Trend Score, which is computed from six technical indicators and is a useful indication of the overall strength or weakness of the indicators for each ticker. Constants used for the computation of the technical indicators can be adjusted for personal preference.
- All reports can be printed or viewed on screen.
- You can quickly build a list of the top tickers listed on a report, and then easily display charts of those tickers.
- TradingExpert Pro's Data Retrieval function provides an option that automatically generates the system's reports when you update your data base. All of the reports are generated and saved, and then can be displayed on screen or printed. When you decide which reports you want to view on a daily basis, you can select those reports to be automatically printed after each updating session of your data base.
- You can instantly display a chart of any ticker in any report without leaving the Reports function. Simply double click on the ticker.
- Historical analysis is easily performed by changing the analysis date and generating the report(s) you are interested in viewing.

2. Using Reports functions

Before reports can be viewed on screen or printed, you must first generate reports. The term generate refers to the process of computing, screening, sorting, and storing all of the information that is required for each report. Once reports have been generated for a particular date, the report information for that date is stored until such time that you generate reports again for a different date.

Generating Reports

Each of TradingExpert Pro's many reports is based on specific pieces of technical information that includes technical indicator readings, the AIQ Expert Ratings, and price and volume data.

To produce reports, the AIQ expert system first sorts through a great deal of data to compute all of the technical information required for every ticker in the data base. Once this information is computed, tickers are sorted based on the value of the specific information which is the focus of each report.

For example, the Weighted Action List records those stocks that have the highest upside and downside Expert Ratings together with price phase direction changes. In addition, the stocks listed on this report are weighted by positive and negative volume indicators to reveal smart money buying and selling.

You can generate all reports, or you can generate a selection of reports. Since generating reports can be a time consuming process, it is a good idea to limit the reports to those you are interested in viewing.

The **Data Retrieval** application provides an option that generates reports automatically after each data retrieval session. This is the most convenient way to insure that current reports are always available for viewing and printing. You can also generate reports from within the **Reports** application. For historical analysis purposes, this Reports function allows you to generate reports for any date for which data is available.

Important: Your data must be current

You can only generate reports if your data is current (or if you have changed the Market Date to an earlier date). To determine if your data is current with the latest closing prices, TradingExpert Pro checks the following:

- Date of your last data base update.
- *Market Close* time (entered in **Data Retrieval**).
- Current date and time

Your data must have been updated within 24 hours of the last *Market Close* time (not counting weekend days or holidays). For example, if the *Market Close* time is 4 PM and your last update was on a Monday, you will not be able to generate reports until after 4 PM on Tuesday - unless you change the Market Date back to Monday. If *Intraday* is designated in **Data Retrieval**, the *Market Close* time is replaced by the *Market Open* time.

To generate all reports from within the Reports application:

1. Open the **Reports** application.
2. Click **Generate** on the menu bar and then choose **Generate All** from the sub-menu. The *Generate Reports* dialog box appears.



Generate Reports dialog box

3. The two lists of options labeled *Daily* and *Weekly* allow you to select the types of reports that will be generated. To generate all reports, all options in both lists should be checked.
4. The date in the box labeled *Market*, indicates the current market date (same as today's date unless today is a weekend or a holiday). The date above labeled *Current* is today's date. To generate reports for a date prior to the Market date, change it to any date for which you have historical data. (To see the earliest date of your data, check the Master Ticker List in *Data Manager* or look at a chart in *Charts* to see when your data was last updated.). If your data is not current, change the date to an earlier date for which you have historical data.
5. Click the **OK** button on the dialog box and the process of generating the reports for the date entered will begin.
6. Once generated, reports are stored on your hard disk and are available for viewing or printing.

To generate a single report from within the Reports application:

1. Open the *Reports* application.
2. In the list of reports, find the report you want to generate and highlight it by clicking on it.
3. Click **Generate** on the menu bar and then choose **Selected Reports** from the sub-menu. The *Generate Reports* dialog box appears.
4. The date in the box labeled *Market*, indicates the current market date. To generate the report for a date prior to this date, change it to any date for which you have historical data.
5. Click the **OK** button on the dialog box and the process of generating the report for the date entered will begin.
6. Once generated, the report is stored on your hard disk and available for viewing or printing.

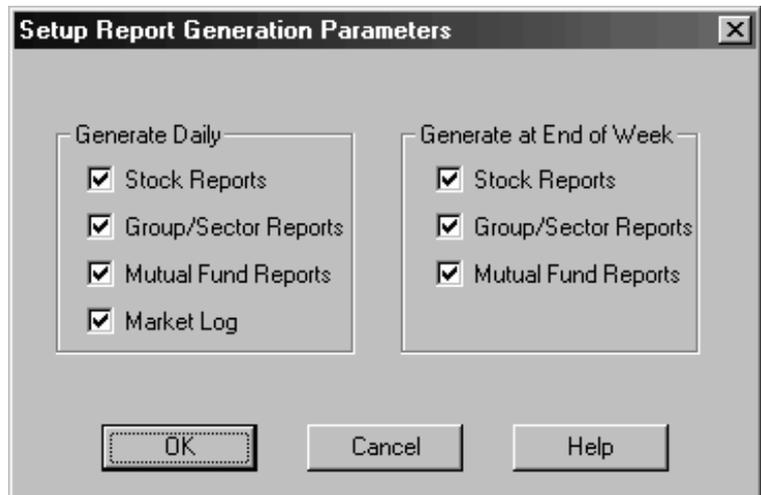
To generate reports automatically after updating

For convenience, reports can be automatically generated after each updating session. You first select the reports that you want generated and then, by choosing an option in **Data Retrieval**, the selected reports are generated automatically after each data update.

1. Select the reports you want generated.

□ To select the types of reports that will be automatically generated:

1. Open the **Reports** application.
2. Click **Generate** on the menu bar and then choose **Setup Parameters**. A dialog box titled *Setup Report Generation Parameters* will appear.



Setup Report Generation Parameters dialog box

3. This dialog box lists selections for two categories of reports:

- **Generate Daily** - Daily Stock, Group/Sector, Mutual Fund, and Market Log reports.
- **Generate at End of Week** - Daily Stock, Group/Sector, and Mutual Fund reports.

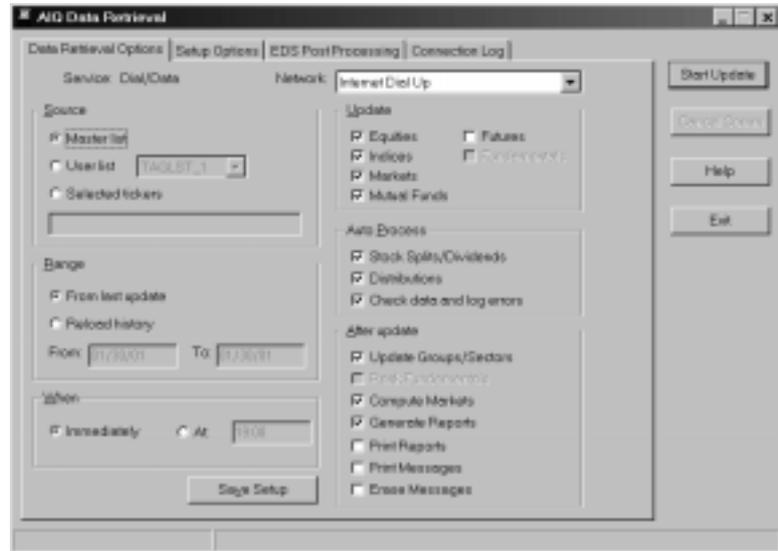
From these lists, choose the types of reports you want to have automatically generated by **Data Retrieval** after each daily update and at the end of each week.

4. Click **OK** to save your selections and continue with Step 2.

2. Specify in Data Retrieval that reports will be automatically generated

□ *To specify that reports will be generated after all data updates:*

1. Open **Data Retrieval**. The *Data Retrieval Options* page of the *Data Retrieval* window provides a number of choices.



Data Retrieval Window

2. In the *After Updates* section, click the **Generate Reports** option.
3. Click **Save Setup** and then click **Exit**.
4. After each updating session, your selected reports will be automatically generated and available for printing and viewing. With each daily update, the stored reports are replaced with the current day's reports.

Viewing Reports

Reports that have been generated are immediately available for viewing on the screen.

□ *To view a report, do the following:*

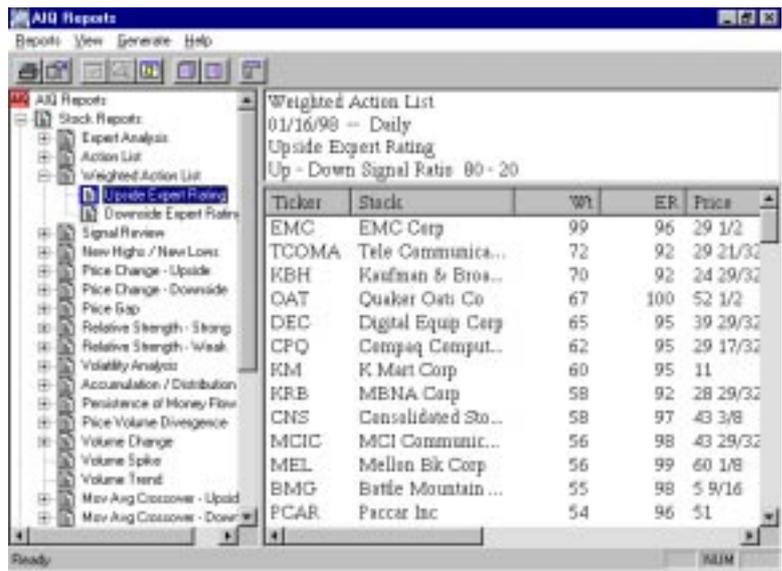
1. Open the **Reports** application.
2. In the left panel, click on the plus sign in the box at the left of a report category. The list will expand to display all of the reports available within that category. Most report categories are further divided into subcategories and you must choose a subcategory before you can select an actual report.
3. When you have located the report you want to view in the left panel of the Reports window, click on the report icon.
4. The report will be displayed in the right panels.
 - The report title is displayed in the upper right panel.
 - The report itself is displayed in the lower right panel.
 - To view all information listed in a report, enlarge the window panel or use the arrows and scroll bar to move the displayed report.
5. To change the displayed report, choose another report icon from the left window panel.

Note

When a Summary report is selected, the *Select Date* dialog box appears listing the dates of the most recently generated reports. From this list, select the date of the report that you want to view.

Note

You can change, rename, and re-sort the columns on a report by clicking on a column head with the right mouse button to display a menu of options. These options are used in the same way as explained in *Customizing Master Ticker List*, Chapter II.



Reports window with report selected

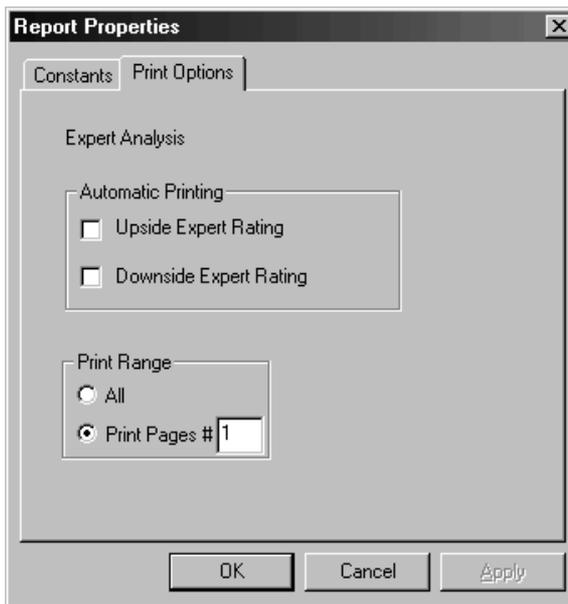
Printing Reports

You can print multiple reports automatically after each updating session using an option in **Data Retrieval**, or you can print multiple generated reports directly from the **Reports** function (see instructions below). You can also print a single report by simply displaying the report, then clicking the *Print* button on the toolbar.

How to select reports for printing

□ *To select an individual report:*

1. Open the **Reports** application.
2. In the left panel of the Reports window, find and highlight a report that you want to print.
3. With the right mouse button, click on the report to display the *Report Properties* dialog box and select the **Print Options** tab.



Print Options tab of the Report Properties dialog box

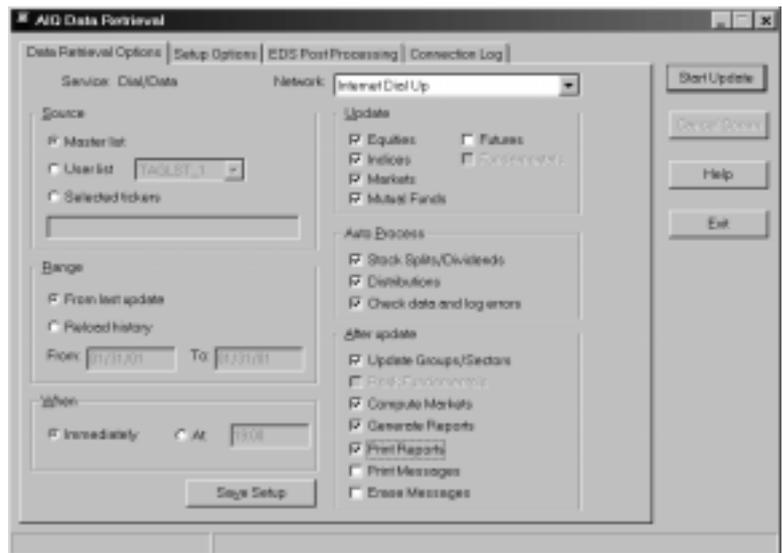
4. To designate the report for printing, check the option box in the section of the dialog box labeled **Automatic Printing** and click **OK**. Notice that the icon that appears next to the report in the list of reports has been changed to a printer symbol. All reports that are designated for printing will display this symbol.

5. Use this procedure to select all reports that you want printed on a regular basis.
6. The selected reports can now be printed automatically after updating, or directly from the **Reports** application.

To print selected reports automatically after updating

□ *Do the following:*

1. Select the reports you want printed (see procedure above).
2. Open the **Data Retrieval** application.
3. In the *After Update* section of the *Data Retrieval Options* tab, click the options for both **Generate Reports** and **Print Reports**.
4. Click the **Save Setup** command button.
5. After each updating session, your selected reports will be automatically generated and printed.



Data Retrieval Window

Printing weekly reports after updating

Weekly reports are printed only during a limited period of time each week. Basically, weekly reports print only after your last update at the end of each week.

The rules for printing weekly reports are as follows:

- If *Intraday* updates is not checked in the *Setup Options* tab of the Data Retrieval window, weekly reports will only be printed from the market close on Friday through the market close on Monday.
- If *Intraday* updates is checked, the period when weekly reports will be printed ends at the time the market opens on Monday.

These limitations apply only to reports that are printed from the *Data Retrieval* application. If the *Print All* option is selected from within the *Reports* application, all weekly reports that are selected to print will print, regardless of the day of the week or the time.

To print reports directly from Reports application

To print selected reports

□ *Proceed as follows:*

1. In the left panel of the Reports window, find and highlight a report that you want to print.
2. With the right mouse button, click on the report to display the *Report Properties* dialog box and select the **Print Options** tab.
3. To designate the report for printing, check the option box in the section of the dialog box labeled **Automatic Printing** and click **OK**.
4. Use this procedure to select all reports that you want printed.
5. Click the **Reports** command on the menu bar to display the *Reports* sub-menu.
6. If you have not previously done so, check that your printer is set up correctly by selecting **Print Setup** on the *Reports* sub-menu. Verify that the settings are correct and make any changes if necessary.
7. Again from the *Reports* sub-menu, select **Print All Reports**.
8. The selected reports, including weekly, will be sent to your printer.

Important

To print reports directly from the *Reports* application, the reports must first be generated.

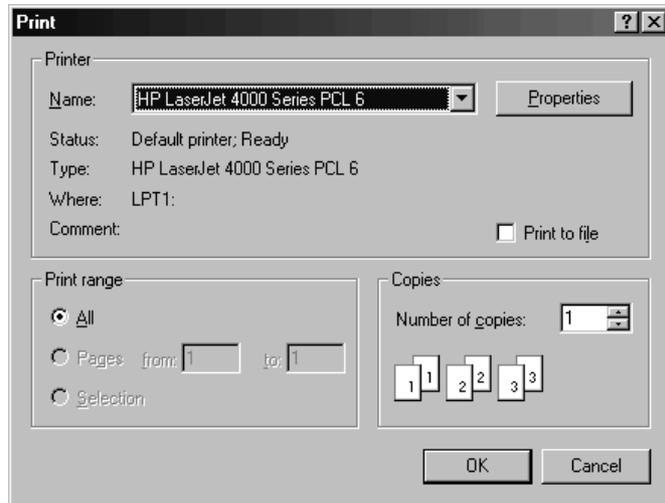
Note

To see a report on your screen prior to printing, select **Print Preview** from the *Reports* sub-menu.

To print a single report

□ *Proceed as follows:*

1. If you have not previously done so, check that your printer is set up correctly by selecting **Print Setup** on the *Reports* sub-menu. Verify that the settings are correct and make any changes if necessary.
2. Select the report you want to print from the list in the left panel of the Reports window, then do one of the following to display the *Print* dialog box:
 - Click the **Print** button on the toolbar.
 - Press **Ctrl+P**.
 - Choose **Print Selected Report** from the *Reports* sub-menu.
3. To send the report to your printer, click **OK**.



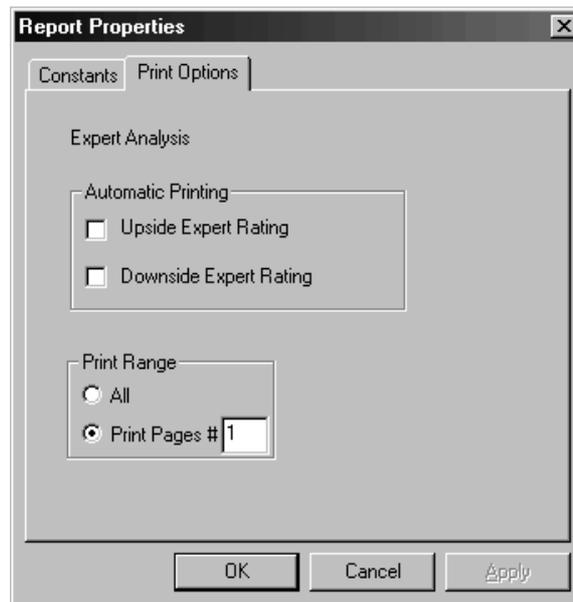
Print dialog box

How to limit the number of printed pages

By default, all pages of every report will be printed. You can, however, limit the number of pages printed. You may be interested only in the first 10 stocks on the reports and want to print just the first pages. You can use a special function in *Report Properties* to limit the number of pages that are printed.

□ *To limit pages by individual report, follow these steps:*

1. Open the **Reports** application.
2. In the left panel of the Reports window, find and highlight a report that you want to print with limited pages.
3. With the right mouse button, click on the report to display the *Report Properties* dialog box and select the **Print Options** tab.
4. The *Print Range* section of this tab contains an option called *Print Pages*. To specify the pages for printing, select this option and then type in the number of pages you want printed.

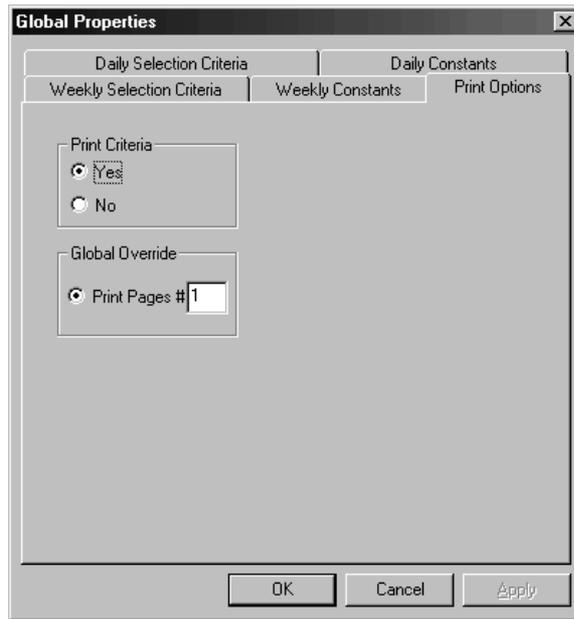


Print Options tab of the Report Properties dialog box

5. Click **OK**.
6. Continue this procedure for each report that you want to print with limited pages

□ To limit pages for all reports, follow these steps:

1. Open the **Reports** application.
2. In the left panel of the Reports window, click on a report category with the right mouse button. The *Global Properties* dialog box will appear. Select the **Print Options** tab.



*Global Properties dialog box
Print Options tab*

3. The *Global Override* section of this tab contains an option called *Print Pages*. To specify the pages for printing, select this option and then type in the number of pages you want printed for all reports.
4. Click **OK**.

How to eliminate printed criteria information

The criteria used in creating each report is printed at the bottom of the report. Criteria information is printed on all reports by default. If you do not want this information printed on the bottom of your reports, you can specify that it be eliminated.

□ *To eliminate printed criteria information, follow these steps:*

1. From the left panel of the Report window, select the category of reports for which you want to eliminate printed criteria. Click on your selection with the right mouse button.
2. From the dialog box that appears (*Global Properties*), select the **Print Options** tab.
3. This tab contains a section called *Print Criteria*.
4. Click the **No** option button for *Print Criteria*.
5. Continue this procedure for each category of reports that you want to eliminate criteria information from.

Displaying charts of tickers

TradingExpert Pro's **Charts** application can be accessed from within the **Reports** application. If you are viewing a report on your screen and decide that you would like to display a chart for a particular ticker listed in the report, you can quickly bring up a chart for that ticker.

□ *To display a chart, do the following:*

1. With a report displayed on your screen, double click on the ticker you want to view a chart of. Or, highlight the ticker and click the **Chart** button on the toolbar.
2. The Reports window will be replaced by the TradingExpert Pro Charts window with a chart of the selected ticker.
3. When you have finished viewing the chart, you can return directly to the report you are viewing by exiting the **Charts** application (press the **Alt + F4** keys). You can also move from Reports to Charts and back again using the Quick Launch Menu toolbar buttons.

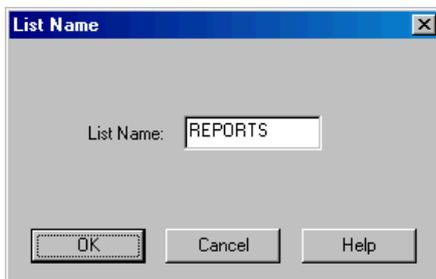
Build List function

This function is used to quickly view the charts of the highest ranked tickers listed on a report. A list containing the topmost tickers from the report is created.

The number of tickers included in the report list is determined by the number of pages specified in the *Print Options* tab of the *Report Properties* dialog box (displayed by clicking on report name with right mouse button).

□ *To use the Build List function:*

1. Display a report
2. Click the **Build Report List** button on the toolbar. A dialog box appears which is used for naming the report list.



List Name dialog box

3. You may accept the default list name, REPORTS, and if a list with the name REPORTS already exists, overwrite the existing list. Or, you can enter a different name.
4. Click **OK**. The *Charts* application is opened with a chart of the top ticker from the report displayed. The newly created report list is selected. Press the **Enter** key to switch the indicator Control Panel to the Explore window which will display the report list.
5. At this point, you can view any of the charts in the report list by clicking on ticker symbols in the Explore window or the left and right Explore arrows.
6. Exiting *Charts* returns you to *Reports*.

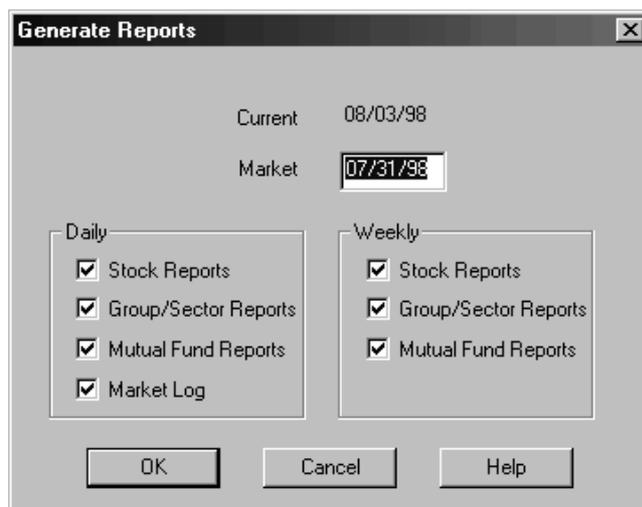
Changing the Market Date for historical study

If you want to view or print reports from a past Market Date for historical study, you can easily do so by changing the Market Date to any prior date for which you have historical data. Without leaving the **Reports** application, you can change the Market Date to a past date, then generate reports. Reports reflecting data for the past Market Date can then be viewed or printed.

To change the Market Date for multiple reports

□ *Do the following:*

1. Open the **Reports** application.
2. Click the **Generate** command on the menu bar, then choose **Generate All** from the sub-menu. The *Generate Reports* dialog box appears.



Generate Reports dialog box

3. In the *Market* text box, type in a past Market Date.
4. Choose the **OK** button and all selected reports will be generated.
5. The generated reports reflecting the past Market Date are stored on your hard disk and are available for viewing or printing. When reports are again generated, the stored reports are replaced with the current versions.

To change the Market Date for a single report

□ *Do the following:*

1. Highlight the report by clicking on it in the left panel of the Reports window.
2. Click the **Generate** command on the menu bar then choose **Selected Report** on the sub-menu. The *Generate Reports* dialog box appears.
3. In the *Market* text box, type in a past Market Date.
4. Choose the **OK** button and the selected report will be generated.
5. The generated report reflecting the past Market Date is stored on your hard disk and available for viewing or printing. When the report is again generated, the stored report will be replaced with the current version.

Exiting Reports

*To exit from the **Reports** application:*

Click **Exit** on the *Reports* sub-menu.

Press the **Alt + F4** keys.

Click the **close box** in the upper right corner of the Reports window.