

MatchMaker Reports

In This Chapter

1. Explanation of the MatchMaker Report screen 862
2. Printing Reports 866
3. Deleting the Report file 868

1. Explanation of the MatchMaker Report screen

When MatchMaker completes an analysis, the correlations are sorted and the Report screen automatically appears displaying the computed results. Results of the last MatchMaker analysis may also be viewed by clicking the *Reports* icon on the MatchMaker toolbar.

In addition to displaying analysis results, the Reports screen provides command buttons which can be used for the following tasks:

- resort correlations in ascending order
- view the MatchMaker settings
- print results
- display charts of selected tickers
- open the TradingExpert *Data Manager* application

The Report screen is designed so that the results of multi-ticker correlations can be easily viewed. The main part of the screen is divided into two sections, *Source A* and *Source B*. These sections correspond to the two data input sections on the MatchMaker Parameters dialog box. The data item entered as *Source A* in the MatchMaker Parameters dialog box always appears in the *Source A* list box on the Report screen.

The MatchMaker Report screen contains several sections and command buttons, which are explained below.

Source A Tickers

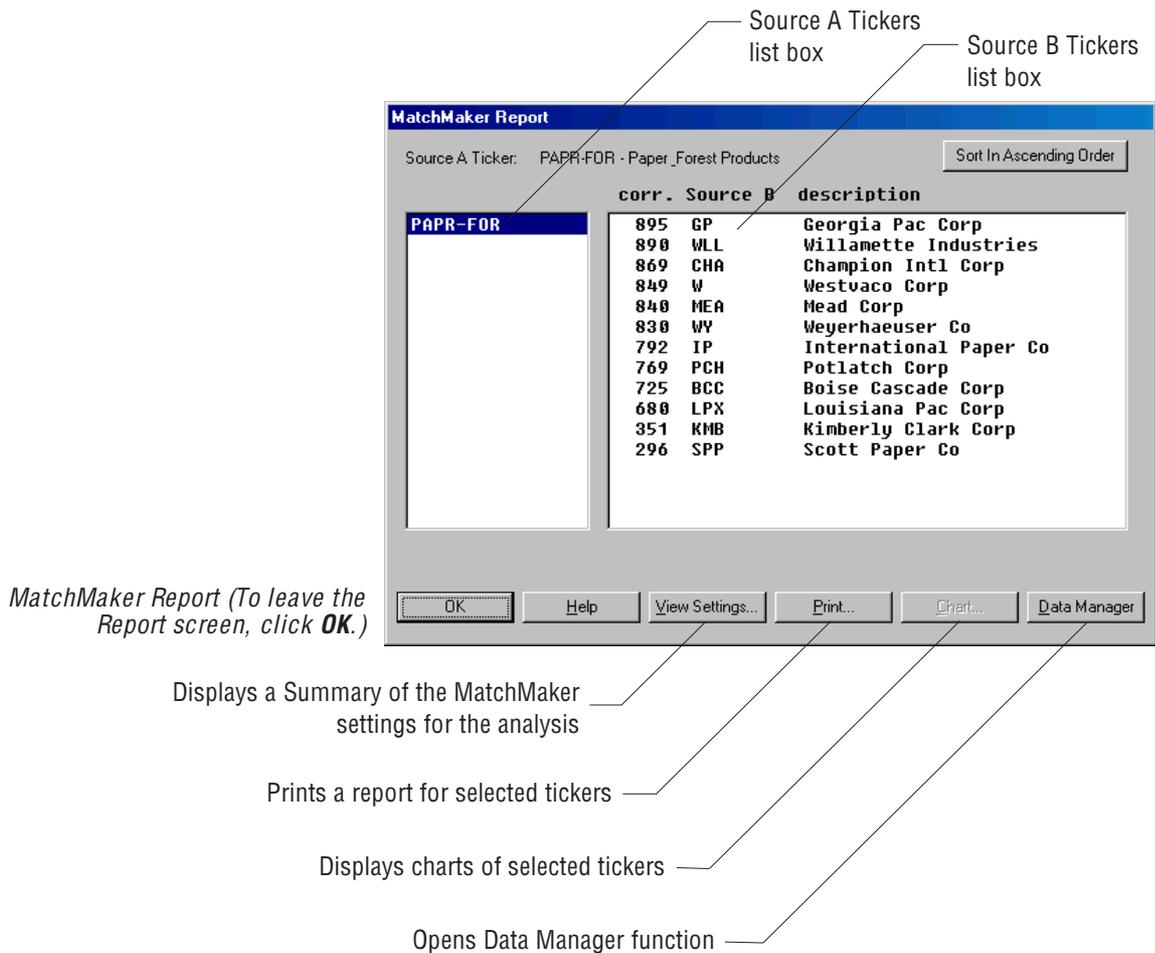
The ticker shown at the top of the screen as *Source A Ticker* is the ticker currently selected in the list box on the left side below. If the analysis specifies multiple Source A Tickers, the tickers will be listed alphabetically in the list box.

Source B Tickers

The first column of the Source B section (labeled *corr.*) lists the correlations between the currently selected Source A ticker and the corresponding Source B ticker (or tickers). When there are multiple Source B tickers, the tickers are listed in the order of their correlation coefficients with the highest appearing at the top of the list. The second and third columns of the Source B list box (labeled *Source B* and *description*) are the Source B ticker symbol and name.

Note

To conserve disk space, only the last correlation report produced is saved to a file.



Sort in Ascending Order

This function is used to resort the Source B Tickers in ascending order so that the highest negative correlation appears at the top of the list. Toggle between *Sort in Ascending Order* and *Sort in Descending Order* by clicking on the command button.

View Settings ...

This command button displays a dialog box which summarizes all of the settings for the analysis shown on the Report screen.

Print...

The *Print* function is used to produce a printed report of the analysis currently displayed on the Report screen. See next section, *Printing Reports*, for instructions on printing a MatchMaker Report.

Chart ...

Use this command button to quickly view Charts of tickers selected on the Report screen without exiting MatchMaker.

► *To display charts from the Report screen, do the following:*

1. On the Report screen, select a **Source A Ticker**. Next, select all **Source B Tickers** that you want to view charts of.
2. Click the **Charts** command button. A dialog box titled *Chart Selected Tickers* will appear.
3. Use the option buttons to specify whether you want to view the selected *Source A Ticker* and/or the *Source B Tickers*.
4. Click **OK**. The TradingExpert *Charts* application will open displaying charts of all the selected tickers.
5. Close the *Charts* application (**Alt + Tab**) to return directly to the MatchMaker Reports screen.

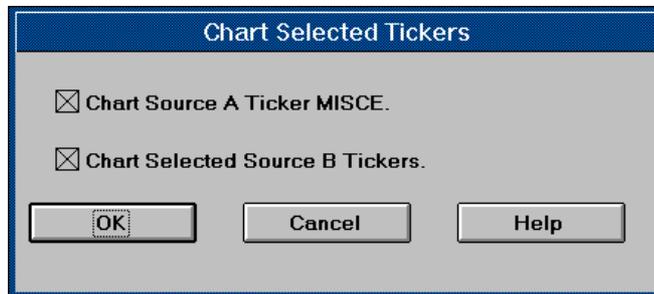


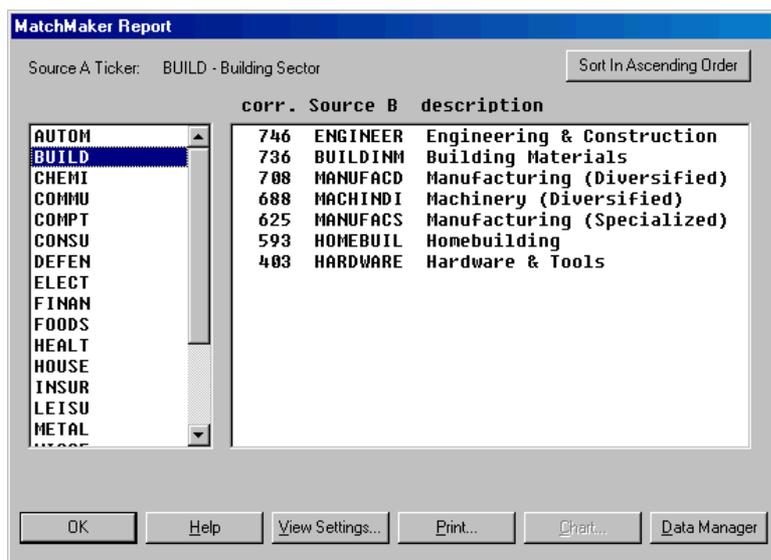
Chart Selected Tickers dialog box

Data Manager

Use this command button to quickly open the *Data Manager* application without exiting MatchMaker.

Viewing analysis results for multiple tickers

The Report screen makes it easy to view analysis results for correlations that compare multiple tickers. For example: all groups in each sector in the Group/Sector List compared to their parent sectors. In this example (see below), the report contains both multiple Source A Tickers (all sectors in list) and multiple Source B Tickers (all groups in the selected sector). To view the correlations for any sector, simply select the sector in the Source A list box by clicking on the sector's symbol, and the Source B list box will instantly change to display all of the groups in that sector.



Report with Multiple Source A Tickers

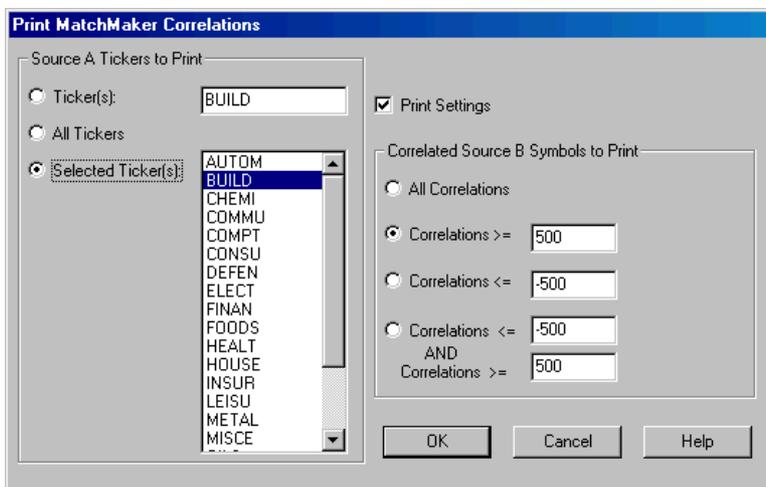
2. Printing Reports

The *Print* function is used to produce a printed report of the analysis currently displayed on the MatchMaker Report screen. Printed reports can be customized to list only those correlations within a specified range and, if the analysis involves multiple Source A Tickers, you can select which Source A Tickers you want to include on the report.

With the ability to customize printed reports, you can include on the report only those tickers with strong positive or strong negative correlations to the Source A Ticker. For example, you may want to see only stocks with high positive correlations. Therefore, you may limit the report to coefficients of +500 and above. Or, you may want to see stocks with rather strong negative correlations. Then, you would limit the report to coefficients of -500 and lower.

► *To print a MatchMaker Report, do the following:*

1. The report must be displayed on the MatchMaker screen.
2. Click the **Print** command button. The *Print MatchMaker Correlations* dialog box will appear.
3. If the analysis involves multiple Source A Tickers, select one of the



Print MatchMaker Correlations dialog box

following three options to specify which tickers will be included in the printed report (*Source A Tickers to Print*).

- **Ticker(s)** Prints only the ticker (or tickers) entered in the adjacent text box. To enter a ticker symbol, first click an insertion point in the text box and then type in the symbol. When entering more than one symbol, separate each symbol with a semicolon.
- **All Tickers** Prints all Source A Tickers.
- **Selected Ticker(s)** Prints only those tickers selected in the adjacent list box. To select multiple tickers, hold down the **Ctrl** key while clicking on each additional ticker.

4. To include a summary of the settings for the MatchMaker analysis that produced the report, a check mark should appear in the check box for *Print Settings*. This option prints the following information at the top of the report:

Time period

Daily or Weekly data

Influence of market index removed and name of index

Source and Type specifications for both data items

5. Select one of the following four options to specify the range of correlation coefficients (for Source B Tickers) that will be included in the printed report. These options are found in the section of the screen titled *Correlated Source B Tickers to Print*.
- **All Correlations** Prints all Source B Tickers, regardless of the value of their correlation coefficients.
 - **Correlations >=** Use this option to print highest correlations only. Prints only those Source B Tickers with correlation coefficients greater than or equal to the value specified in the adjacent text box. The default value is 500. To change this value, click on the text box and enter a new value.
 - **Correlations <=** Use this option to print lowest correlations only. Prints only those Source B Tickers with correlation coefficients less than or equal to the value specified in the adjacent text box. The default value is -500. To change this value, click on the text box and enter a new value.
 - **<= Correlations >=** Use this option to print highest and lowest correlations on same report. Prints only those Source B Tickers with correlation coefficients that are above and below (or equal to) the values specified in the two text boxes. The default values are -500 and 500. To change either value, click on the text box and enter a new value.

Note

The symbol \geq is an abbreviation for “greater than or equal to” and the symbol \leq is an abbreviation for “less than or equal to”.

3. Deleting the Report file

MatchMaker saves the most recent report in the TradingExpert RPTDATA directory, C:\WINTES\RPTDATA. If for any reason you need to delete the MatchMaker report files, a special command is provided for this purpose.

► *To delete the MatchMaker report file, do the following:*

1. Click **MatchMaker** on the menu bar.
2. On the MatchMaker drop-down menu, select **Delete MatchMaker Report**.
3. Answer **YES** to *Are you sure you wish to delete the MatchMaker Report?*