

Managing Your Data

In This Chapter

In this chapter, you will learn how TradingExpert Pro's *Data Manager* is used to set up and manage the data for all of the securities, futures, indices, mutual funds, groups, and sectors that you are tracking.

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Main window

The main *Data Manager* window is divided into two sections:

- **Right - Master Ticker List window:**

The wider of the two sections always displays a list, called the Master Ticker List. This is a list of all of the tickers (stocks, indices, futures, mutual funds, groups, sectors, etc.) contained in your data base. It is the key component in TradingExpert Pro's file management system. Information for each ticker includes symbol, name, type (stock, mutual fund, etc.), market on which ticker is traded, and the first and last dates of data.

- **Left - List window:**

The narrower of the two sections displays a list (Group/Sector List or user created list). The list that is displayed in this window is chosen from the *Selected List* text box located on the toolbar. To see all available lists, click the **arrow** on the *Selected List* text box. A drop-down box displays the available lists. Until you have added other lists, the only name to appear here will be the Group/Sector List that you chose to install (SP500 or AIQALL).

Note

In Section 4 of this chapter, you will find instructions on how to easily insert tickers from the Master Ticker List (right window) into a list (left window).

To view tickers in your Group/Sector List, you can expand the master sector (ZALL or MASTER) and underlying sectors and groups using these two methods:

- Double click with your mouse on the symbol you want to expand. Double click again to contract.
- Click the box containing the plus sign (+) located to the left of the sector or group you want to expand. When the sector or group is expanded, the symbol in the box changes to a minus sign (-). To contract, click the box again.

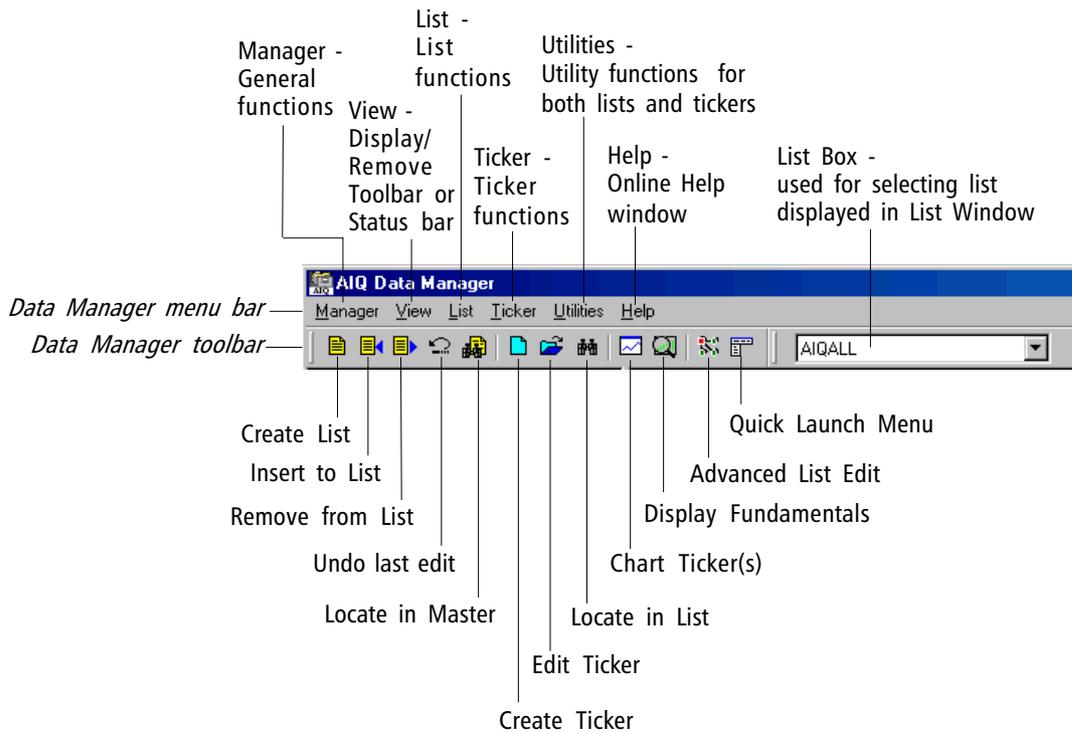
The scroll bar on the right side of the window is used for moving up and down in the Master Ticker List. The scroll bar separating the two sections is used for moving up and down in the currently displayed list.

Toolbar

Located on the **Data Manager** toolbar are icons which represent functions for lists and functions for tickers. To the right of these icons is the list box which is used to select the list displayed in the List window.

Menu Bar

Shown on the menu bar are the six **Data Manager** menus. Each menu command has a drop-down menu with a list of functions.



2. Data base

A key to working successfully with TradingExpert Pro is continuous management of your data base. This chapter contains information to help you better understand the structure of your data base, as well as an introduction to data base maintenance functions.

Note

Unlike other data, group and sector data is not obtained directly from a data service. At the completion of an update, TradingExpert Pro computes group and sector data from ticker data using the group and sector list files that were installed during the installation process.

Data base structure

Every ticker that you will be following is first entered in the Master Ticker List. Every line in the Master Ticker List represents one ticker (stock, index, mutual fund, group, market, etc.) that is being tracked, and there is a separate data file for each of these tickers.

In addition to ticker data files, your data base also contains files for Report data, and for any notes that you may wish to make on individual tickers.

It is from your Master Ticker List that the **Data Retrieval** function determines what data will be requested from the data service. When you add a ticker (stock, index, mutual fund, future, etc.) to the list, TradingExpert Pro automatically creates a price data file for the new ticker during the updating process.

Data delivered with TradingExpert Pro

During the installation process (see Installing AIQ TradingExpert Pro in your New Users Guide), data directories were created and the historical data listed below was copied to your hard disk.

- Stocks (5 years of historical data)
 - S&P 500 stocks
- Market Indices (20+ years)
 - Dow Jones Industrial Average, DJIA
 - New York Stock Exchange Index, NYA
 - Standard & Poor's 500 Index, SPX
- Markets in addition to the DJIA
 - American Exchange
 - OTC Exchange
- Other Indices (5+ years)
- Group and Sector Lists

Note

Accompanying TradingExpert Pro is an additional Data CD containing historical data for 10,000+ symbols including stocks, indices, mutual funds, and futures. For instructions, refer to Section 3 of this chapter.

Chapter III of this manual gives complete instructions on how to connect to an online data service so that you can update this data to the current date.

Change data paths

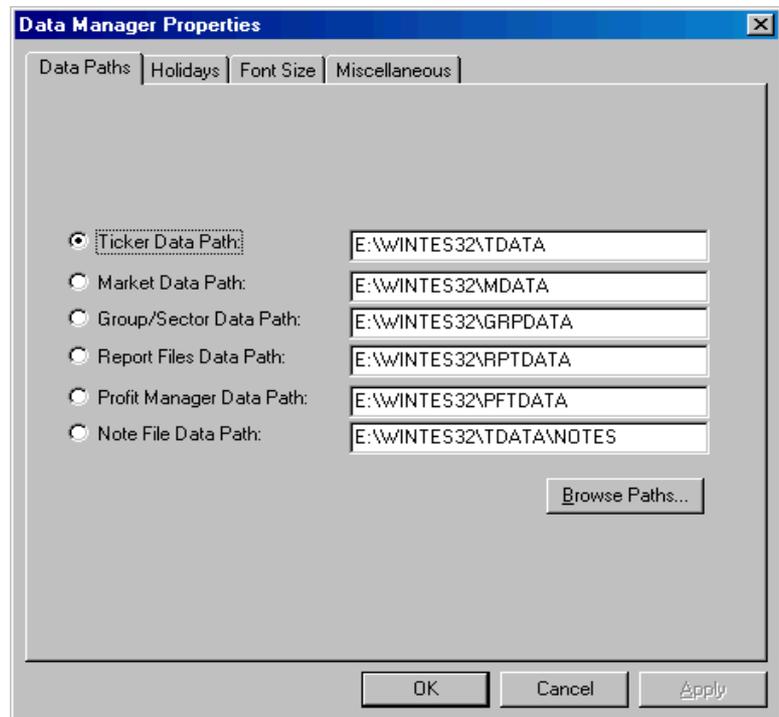
Note

The **Miscellaneous** tab of the *Data Manager Properties* function is used to show hidden information. If you have selected the “Don't show this again” option anywhere in *Data Manager*, use this tab to remove this restriction and display all hidden information.

During installation you were asked to accept the TradingExpert Pro default program data path (C:\WINTES) or enter another path. In addition to creating a program directory on your hard drive, the TradingExpert Pro installation created six data directories. Should you want to change the active data path for a data directory, TradingExpert Pro provides a function designed for this purpose.

□ *To change a data path, proceed as follows:*

1. Open the *Data Manager* application to display the *Data Manager* window.
2. Click **Manager** on the menu bar, then click **Preferences** on the drop-down menu. The *Properties window* will appear on your screen with the *Data Paths* page displayed. The six data paths listed pertain to the six data directories created during installation.



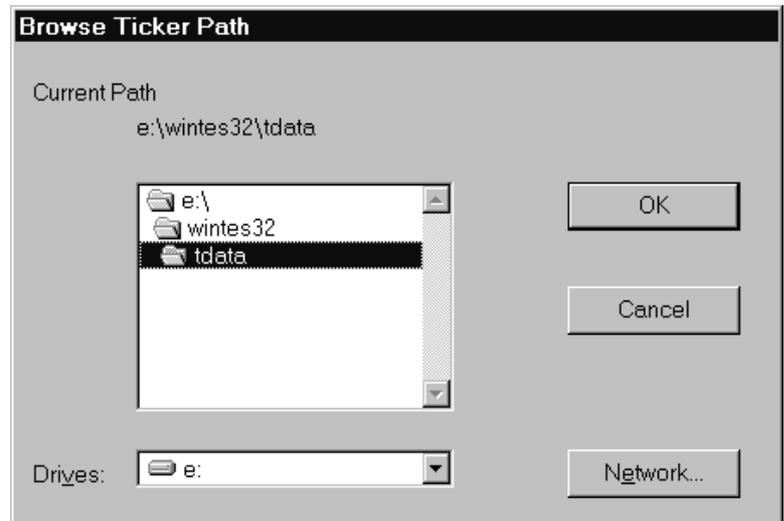
Data Paths page



3. Move your mouse to the text box containing the data path that you wish to change. Delete the existing path and type in the new data path name.
4. Choose **OK**.
5. If the new path already exists, the active path is changed to the newly designated path.
6. If the new path does not exist, a small window appears informing you that the data path was not found and asking if you want to create a path by that name. Answer **Yes** and the new data path will be created and will become the currently active path.
7. After the new path is created, a final dialog box appears asking you if you want to rebuild your Master Ticker List. Answer **Yes**.

Using the *Browse Paths* feature

The *Data Paths* dialog box contains a feature called *Browse Paths* which allows you to view the directory tree of the currently selected data path. This feature may also be used to view the directory tree of any of your drives and directories. This latter capability is useful in locating directories on your computer's hard drive.



Browse Ticker Paths dialog box

Note

Change the drive you wish to view in the lower text box. Click the arrow to view all drives.

To view the directory tree for a data path:

1. In the *Data Paths* dialog box, click the option button for the data path that you wish to view.

2. Choose the **Browse Paths** command button. The *Browse Ticker Path* dialog box that appears will display the directory tree for the selected data path.
3. To view the directory tree for a directory, double click on the root directory just as you would when using the Windows File Manager.

Holiday designation

TradingExpert Pro provides a function called *Holidays* that is used to bypass data requests on holidays.

To prevent data problems, TradingExpert Pro will not request data for any day that is designated as a holiday. It is otherwise possible that a data service will transmit data for a day when the market is closed because of a holiday and corrupt your data files. Also, when no data is retrieved for a holiday, zero's are inserted in the data file for that date. If not designated as a holiday, the zero's will be included in computation of indicators and Expert Ratings.

Uses of the *Holidays* function include the following:

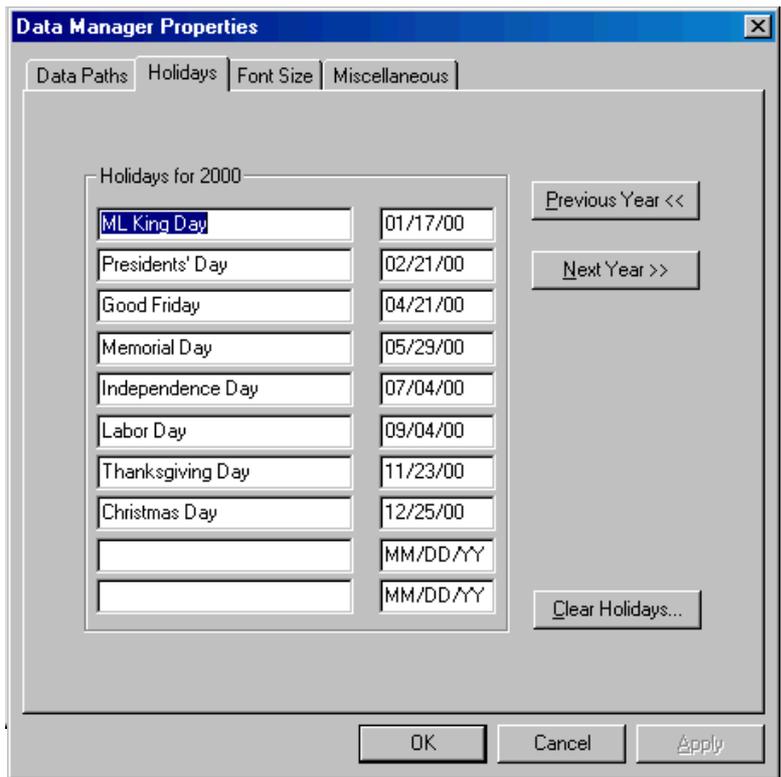
- Although TradingExpert Pro is delivered with the U.S. market holidays preset, *Holidays* can be used to specify any additional days when the market is closed for unexpected reasons.
- *Holidays* may be used to designate holidays for markets other than the U.S. market.

□ *How to use Holidays:*

1. Open the **Data Manager** application to display the **Data Manager** window.
2. Click **Manager** on the menu bar, then click **Preferences** on the drop-down menu. The *Properties window* will appear on your screen.
3. Choose the **Holidays** tab. The *Holidays* page will appear on your screen.

□ *To add a holiday:*

1. Click the mouse cursor on one of the text boxes that does not contain a holiday. Type in a name for the holiday.
2. Press the **Tab** key to move the cursor to the text box for the date of the holiday, and type in the date.
3. Click **OK** to save your entry.



Holidays tab

□ *To display previous year, or next year holidays:*

- Click the appropriate command button.

□ *To change all holidays (for markets other than the U.S.):*

1. Click the **Clear Holidays** command button to clear all holidays designated for the current year.
2. Click the mouse cursor on the first text box and type in a name for the holiday.
3. Press the **Tab** key to move the cursor to the box for the date of the holiday and type in the date.
4. Repeat the steps above until all new holidays have been entered for the current year.
5. Choose the **OK** button to save the entries.

File management

A key to working successfully with TradingExpert Pro is astute management of your data base; knowing what stocks to track, when to delete stocks and other data, how to maintain proper sized price data files, and how to keep your data clean and free of errors. All are important for efficient and effective file management.

The selection of stocks in your data base should be a basic list of stocks, such as those delivered with the system, augmented from time to time by other stocks of interest. Although AIQ TradingExpert Pro is primarily a technical analysis program, one place where fundamental analysis can be utilized is in the selection of stocks for your data base. You then can track the performance of those stocks.

The final section of this chapter reminds you of what steps to take for efficient management of your data base.

3. Master Ticker List

The Master Ticker List is a list of all the stocks, warrants, mutual funds, futures, indices, and markets that are contained in your data base. This list also contains all of the groups and sectors that comprise your Group/Sector List and any special user created groups such as mutual fund groups. If you installed the data delivered with TradingExpert Pro, your Master Ticker List should now contain all of the data listed above.

To view the Master Ticker List, open the **Data Manager** application (double click the **Data Manager** icon). The main **Data Manager** window is divided into two sections. The narrow section on the left side of this window is used for displaying lists. The rest of the window displays the Master Ticker List. The scroll bar on the right side of the window is used for moving up and down in the Master Ticker List.

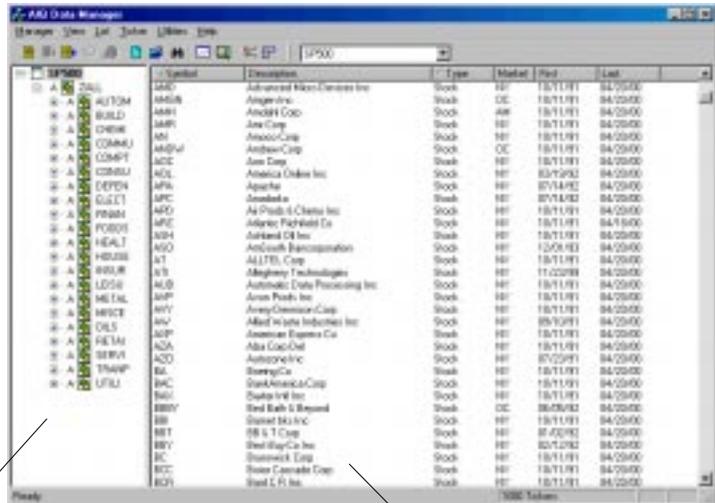
Tip

Click the right mouse button to display a pop-up menu that provides quick access to often used commands.

You can add to your Master Ticker List as many tickers (stocks, indices, mutual funds, futures, etc.) as you want to maintain and have room for in your disk storage system.

Note

To change the font size or style, go to the **Font Size** tab of the **Data Manager Properties** function (**Manager/Preferences**).



Symbol	Description	Type	Market	First	Last
AAO	Advanced Micro-Devices Inc	Stock	HF	15/11/91	84/2500
AAU	Angerline	Stock	OC	18/11/91	84/2500
AAW	Amgen Corp	Stock	HF	18/11/91	84/2500
AB	Amgen Corp	Stock	HF	18/11/91	84/2500
ABC	Amgen Corp	Stock	OC	18/11/91	84/2500
ABD	Amgen Corp	Stock	HF	18/11/91	84/2500
ABE	Amgen Corp	Stock	HF	18/11/91	84/2500
ABF	Amgen Corp	Stock	HF	18/11/91	84/2500
ABG	Amgen Corp	Stock	HF	18/11/91	84/2500
ABH	Amgen Corp	Stock	HF	18/11/91	84/2500
ABI	Amgen Corp	Stock	HF	18/11/91	84/2500
ABJ	Amgen Corp	Stock	HF	18/11/91	84/2500
ABK	Amgen Corp	Stock	HF	18/11/91	84/2500
ABL	Amgen Corp	Stock	HF	18/11/91	84/2500
ABM	Amgen Corp	Stock	HF	18/11/91	84/2500
ABN	Amgen Corp	Stock	HF	18/11/91	84/2500
ABO	Amgen Corp	Stock	HF	18/11/91	84/2500
ABP	Amgen Corp	Stock	HF	18/11/91	84/2500
ABQ	Amgen Corp	Stock	HF	18/11/91	84/2500
ABR	Amgen Corp	Stock	HF	18/11/91	84/2500
ABS	Amgen Corp	Stock	HF	18/11/91	84/2500
ABT	Amgen Corp	Stock	HF	18/11/91	84/2500
ABU	Amgen Corp	Stock	HF	18/11/91	84/2500
ABV	Amgen Corp	Stock	HF	18/11/91	84/2500
ABW	Amgen Corp	Stock	HF	18/11/91	84/2500
ABX	Amgen Corp	Stock	HF	18/11/91	84/2500
ABY	Amgen Corp	Stock	HF	18/11/91	84/2500
ABZ	Amgen Corp	Stock	HF	18/11/91	84/2500
ABA	Amgen Corp	Stock	HF	18/11/91	84/2500
ABB	Amgen Corp	Stock	HF	18/11/91	84/2500
ABC	Amgen Corp	Stock	HF	18/11/91	84/2500
ABD	Amgen Corp	Stock	HF	18/11/91	84/2500
ABE	Amgen Corp	Stock	HF	18/11/91	84/2500
ABF	Amgen Corp	Stock	HF	18/11/91	84/2500
ABG	Amgen Corp	Stock	HF	18/11/91	84/2500
ABH	Amgen Corp	Stock	HF	18/11/91	84/2500
ABI	Amgen Corp	Stock	HF	18/11/91	84/2500
ABJ	Amgen Corp	Stock	HF	18/11/91	84/2500
ABK	Amgen Corp	Stock	HF	18/11/91	84/2500
ABL	Amgen Corp	Stock	HF	18/11/91	84/2500
ABM	Amgen Corp	Stock	HF	18/11/91	84/2500
ABN	Amgen Corp	Stock	HF	18/11/91	84/2500
ABO	Amgen Corp	Stock	HF	18/11/91	84/2500
ABP	Amgen Corp	Stock	HF	18/11/91	84/2500
ABQ	Amgen Corp	Stock	HF	18/11/91	84/2500
ABR	Amgen Corp	Stock	HF	18/11/91	84/2500
ABS	Amgen Corp	Stock	HF	18/11/91	84/2500
ABT	Amgen Corp	Stock	HF	18/11/91	84/2500
ABU	Amgen Corp	Stock	HF	18/11/91	84/2500
ABV	Amgen Corp	Stock	HF	18/11/91	84/2500
ABW	Amgen Corp	Stock	HF	18/11/91	84/2500
ABX	Amgen Corp	Stock	HF	18/11/91	84/2500
ABY	Amgen Corp	Stock	HF	18/11/91	84/2500
ABZ	Amgen Corp	Stock	HF	18/11/91	84/2500

List Window

Master Ticker List Window

Finding tickers in the Master Ticker List

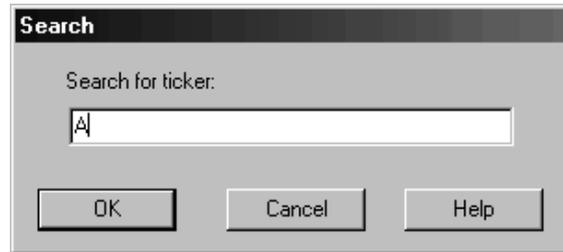
Note

An “A” to the left of a ticker in the list window indicates that the status of the ticker is active.

Tickers are listed by type (stocks, groups, sectors, etc.) with stocks appearing at the top. Within each type, tickers are listed alphabetically. You can use the scroll arrows or the scroll bar to move up and down the list to find a ticker or you can use the *Search* feature to easily move directly to a ticker.

□ *To search for a ticker in the Master ticker List:*

1. Type the first character of the symbol. The *Search* dialog box will appear.



Search dialog box

2. Finish typing the remaining characters of the symbol.
3. Click **OK**. The Master Ticker List is redisplayed with the ticker highlighted at the top of the window.
4. If the ticker is not present in your Master Ticker List, a new dialog box appears. This dialog box asks you if you would like to search for the ticker on the AIQ Data CD.



Search for tickers on AIQ CD dialog box

5. To import data for the missing ticker, click **Yes**.
6. A dialog box will appear titled *Import Tickers from AIQ Data CD*. For instructions, see *Importing Tickers from the AIQ Data CD* later in this chapter.

Note

To use *Chart Ticker*, the ticker(s) must be highlighted in the Master Ticker List window. You cannot chart a ticker from the List window. Use the **Locate in Master** toolbar button to switch the highlight from the List window to the Master Ticker List window.

Note

To display fundamental information for a ticker, click the **Fundamentals** toolbar button.

Using the Chart Ticker feature

While working in the *Data Manager* function, you can quickly display a chart of any ticker that is active in your Master Ticker List by using the *Chart Ticker* feature.

□ *To display a chart using Chart Ticker, do the following:*

1. Select (by clicking with your mouse) the ticker you want to chart. Choose multiple tickers to chart by holding down the **Ctrl** key.
2. Click the **Chart Ticker** button on the toolbar. (Or, select the **Chart Ticker** command on the **Ticker** sub-menu.) The chart(s) will be displayed.
3. To return to the *Data Manager* application, close the *Charts* window by clicking the **close button** in the upper right corner, or by pressing the **Alt + F4** keys.

Entering tickers in the Master Ticker List

The functions used for adding tickers to your Master Ticker List as well as for modifying or deleting existing tickers are located on the **Ticker** sub-menu.

To add a new ticker to the list, you must make entries in two dialog boxes. The symbol and type of ticker is entered in the first dialog box. Information necessary for data retrieval and symbols for relative strength analysis are entered in the second dialog box.

Entering all tickers except Market Tickers

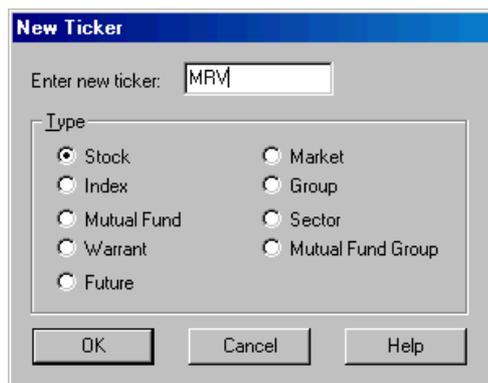
As noted above, adding a new ticker to the Master Ticker List requires data entries in two dialog boxes. All data entries are explained in detail on the following pages. Online help may also be obtained by clicking the **Help** button at the bottom of a dialog box.

Market Ticker Note

The second dialog box that appears for entering a new ticker is identical for all types of tickers except those specified as *Market* type. *Market* is a special type of ticker which differs from other types in that market breadth data is included. Instructions for entering data for the *Market* type tickers follow this section.

□ *To enter a new ticker, do the following:*

1. Click **Ticker** on the **Data Manager** menu bar.
2. Select the first option, **New**, from the sub-menu. The first of two dialog boxes appears.



First New Ticker dialog box

Second New Ticker dialog box

3. The dialog box requires two entries (for more information, see following pages):

- *Symbol* - In the text box, type the symbol for the new ticker that you are adding to your Master Ticker List.
- *Type* - Click the option that is consistent with the type of ticker that you are adding.

4. After completing these entries, choose **OK** and the second dialog box appears.

5. Complete the following entries in the second dialog box. (More information for these entries can be found starting below.)

- Description (name of the security, index, mutual fund, etc.)
- Market (on which the ticker trades)
- Alias (optional)
- Active (must be checked for telephone updating)
- Relative Strength Symbols, Index and Ticker (for relative strength analysis, optional)
- User Code (optional)
- First Date (first date of data to be retrieved)
- Display as (fractions or decimals)
- Store as (fractions or decimals)

Note

If the symbol entered in the first dialog box is already in your Master Ticker List, the *Edit Ticker* dialog box will appear. Data for the ticker will be displayed in this dialog box where it can be modified.

Note

When a check mark appears in the check box of a command, that command is “turned on.” To turn the command “off,” simply click the check box to remove the check mark.

6. After completing the entries in this second dialog box, choose **OK** to add the ticker to your Master Ticker List. (You can abort a New Ticker entry at any time by clicking the **Cancel** command button.) When a new ticker is added, the Master Ticker List is scrolled so that the new entry appears at the top of the list.
7. The new tickers will be updated during the next telephone update session.

Explanation of data entries in New Ticker dialog boxes

Symbol

The ticker symbol for the item you are entering. Ticker symbols for securities can be obtained from your broker or from publications such as *The Standard & Poor's Stock Guide*.

- Only alphanumeric characters, one dash, and one “@” character are allowed in the Symbol field.
- International stocks require an “@” after the symbol.
- For instructions on entering special symbols, such as class of security, see the following examples.

Ticker	Type	Examples
XXX	equity	AA, IBM, INTC
XXX-P	preferred stock	CCI-P
XXX-A	class security	BF-A, MMZ-B
XXX-PA	preferred class	E-PA, ESC-PA
XXX	index	OEX, XMI, GSM, other*
XXXXX	mutual fund	FDFAX
XXXXXX	future	TB1600

* AIQ index symbols, see Table A

NASDAQ Ticker Symbols

Enter the entire symbol including any characters that designate preferred or class. Example: ACCO-B for Adolph Coors Class “B”

If you have difficulty finding these symbols, request information from your data service.

Note

Be sure to enter the appropriate Market Code from **Table C** (International Market Codes) in the *Market* text box.

International Securities Symbols

Data for foreign market securities is available from Dial/Data and Interactive Data Corporation. (Dial/Data at this printing provides data for Canadian and London markets only.) To request international data from these services, use the following conventions:

- Place an “@” at the end of the ticker symbol to designate a security as international.
- For Canadian securities, a letter T may also be placed following the “@” character.
- All of the above conventions regarding preferred and class stocks apply.

Example:

For Canadian Tire Corp. Class A, enter:

CTR-A@ or CTR-A@T (either will do)

Index Symbols

Table A (next page) is a list of AIQ index ticker symbols for some of the more active indices. These are the index symbols you use to update with the data service you subscribe to. The AIQ symbols will be translated automatically to the ticker symbol required by your data service.

If you are following an index that is not listed, please call your data service for the appropriate symbol.

Table A
Index Ticker Symbols

Index	Market	Index Symbol
S&P 100	Chicago	OEX
S&P 500	Chicago	SPX
S&P 500 new	Chicago	NSX
Major Market	American	XMI
Computer Tech	American	XCI
Oil and Gas	American	XOI
Institutional	American	XII
Market Value	American	XAM
International	American	ADR
Gold/Silver	Philadelphia	GSM
Value Line Geom	Philadelphia	VAL-I
Value Line Arith	Philadelphia	VAN
National OTC	Philadelphia	NOT
Utilities	Philadelphia	PHU
Dow Jones Industrials		INDU
Dow Jones 65		COMP
Dow Jones Transportation		TRAN
Dow Jones Utilities		UTIL
Financial Comp	Pacific	FNC
Technology	Pacific	PSE
NY Composite	New York	NYA
NY Beta	New York	NYB
NY Financial	New York	NYF
NY Industrial	New York	NYI
NY Transportat'n	New York	NYT
NY Utilities	New York	NYU
Banks	NASDAQ	OTB
Comb Composite	NASDAQ	OTC
Industrial	NASDAQ	OTI
Insurance	NASDAQ	OTS
Financial	NASDAQ	OTF
100	NASDAQ	OTX
Other Finance	NASDAQ	OTO
Transportation	NASDAQ	OTT
Utility	NASDAQ	OTU

Type

TradingExpert Pro categorizes tickers into nine specific types as follows:

1. Stock (includes Class or Preferred Stock)
2. Index
3. Mutual Fund
4. Warrant
5. Future
6. Market
7. Group
8. Sector
9. Mutual Fund Group

Stock, Index, Mutual Fund, Warrant, Future

Data for these first five types is retrieved from your data service.

Market

Market is a special type of ticker that contains market breadth information in addition to price and volume data. Market breadth data for this type of ticker is retrieved from a data service. AIQ market timing Expert Ratings are computed for Market tickers.

Group

Data for this type of ticker is computed from the price and volume data for each of the tickers in the group's list. Expert Ratings are computed for groups.

Sector

Data is computed from a list of groups. Expert Ratings are computed for sectors.

Mutual Fund Group

Data is computed from a list of mutual funds. Because volume is unavailable for mutual funds, there are no Expert Ratings for this type.

Description

Enter a name (up to 35 characters in length) for the stock, index, mutual fund, etc.. Whatever name is entered here will be displayed throughout the system (on charts, reports, etc.).

Note

For communications with your data service, a Market code is not necessary for mutual funds (the Market code defaults to OC for mutual funds).

Tip

If you are unsure of the market on which a particular ticker trades, enter **XX** for the Market code. The data service will find the most active market for that ticker.

Note

For codes not listed, please contact Interactive Data Corporation

Market

This two-character code represents the market, or exchange, on which the stock is traded. The code can be obtained from Tables B and C. It is very important that this code is correct, because it is used in communications with your data service. An incorrect exchange code can cause communication errors.

Table B
Market (Exchange) Codes

Code	Market (Exchange)
NY	New York
CB	Chicago Board
AM	American
PH	Philadelphia
PC	Pacific
MD	Midwest
OC	OTC-NASDAQ

Table C
International Market Codes

*International Markets supported
by Interactive Data Corporation*

Code	Market
A	Australia
G	Germany
R	Germany (if using the Sedol number)
H	Hong Kong
J	Japan
D	London
L	Luxembourg
S	Singapore
T	Thailand
MO	Montreal
TO	Toronto
VC	Vancouver

Table C
(cont'd)
International Market Codes

*International Markets
supported by Dial/Data*

Code	Market
LN	London
MO	Montreal
TO	Toronto
VC	Vancouver
CA	Alberta

Alias

An alias may consist of any keyboard characters entered in any sequence and can contain a maximum of eight characters.

Entering an Alias has the following effect:

When data is requested for the ticker, the updating process substitutes the *Alias* for the *Symbol*.

An alias can be useful in several situations:

- An alias allows the user to replace the actual ticker symbol with any name or abbreviation that might be considered more appropriate or easier to remember. The updating process substitutes the alias for the symbol.
- When the ticker symbol required by the data service contains characters which are not legal for a symbol (only alphanumeric characters, one dash, and one @ are allowed in symbols), an alias constructed of the required characters can be entered.
- When you want to request an update by the CUSIP number rather than by the symbol, you can enter the CUSIP as an alias. In this case, the CUSIP number, which consists only of numbers, is accepted by the data service and updated accordingly.

Note

A special function allows you to easily activate or inactivate every ticker in your Master Ticker List or in any user created list. This function, *Change Status Codes*, is found on the *Utilities* sub-menu.

Active

A check mark in this box indicates that this ticker is Active. To change its status to Inactive, remove the check mark (by clicking). If a ticker is Inactive, the updating process will no longer retrieve data for that ticker.