Reference Manual

Beyond Charts

September 2014

CONTENTS

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FOREWORD

- Beyond Charts is a foundation product that at its core is a technical analysis or charting product but has been designed to be a global portfolio management system that, in time, will incorporate the full functionality for:

- Advanced technical analysis and charting.

- Multiple integrated mechanical trading methodologies.

- Generic portfolio management.

- Specific portfolio management for the integrated trading methodologies.

- Support for multiple world stock exchanges.

In its current version, as at September 2014, it includes intermediate charting capabilities, the full functionality of the Beyond Charts Formula Language (BCFL) and support for the ASX and USA Exchanges along with various world indices commodities and FX.

Throughout this manual and in all Beyond Charts sourced material we have used the words "active investor". These words best describe the majority of Beyond Charts customers. Where the terminology of "investor" is used, the reference is generally to people who do not have the knowledge, tools and time to actively invest in the stock market or are passive in their investment approach.

We welcome your feedback and suggestions.

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Because the "financial advice" information in this publication is general in nature, it may not be relevant to your individual circumstances. Before making any investment or financial planning decisions, you should consult a professional adviser who can help you decide whether your decision is appropriate for you.

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1

GENERAL TERMS

The following topics are covered in this chapter:

- Panels
- Windows
- Tables

1 GENERAL TERMS

1.1 Panels

The Panels in Beyond Charts are available from vertical tabs on either side of the main screen. These tabs slide out to reveal the panels.

To open a panel:

- Hover the cursor over the tab, or
- Left click the tab.

Panels will auto close unless pinned (see below)

1.1.1 Panel Width

The width of a panel is adjustable by:

- Left click and drag the inner edge of the panel to the desired width.

Adjusting the width of one panel will also alter the width of every panel in that panel group.

1.1.2 Pinning a Panel open

In the top right corner of every panel is a horizontal pin or tack icon. Clicking once on the pin will cause the panel to be 'pinned' in place thereby preventing the panel from auto closing. The pin will change to a vertical position when the panel is pinned open.
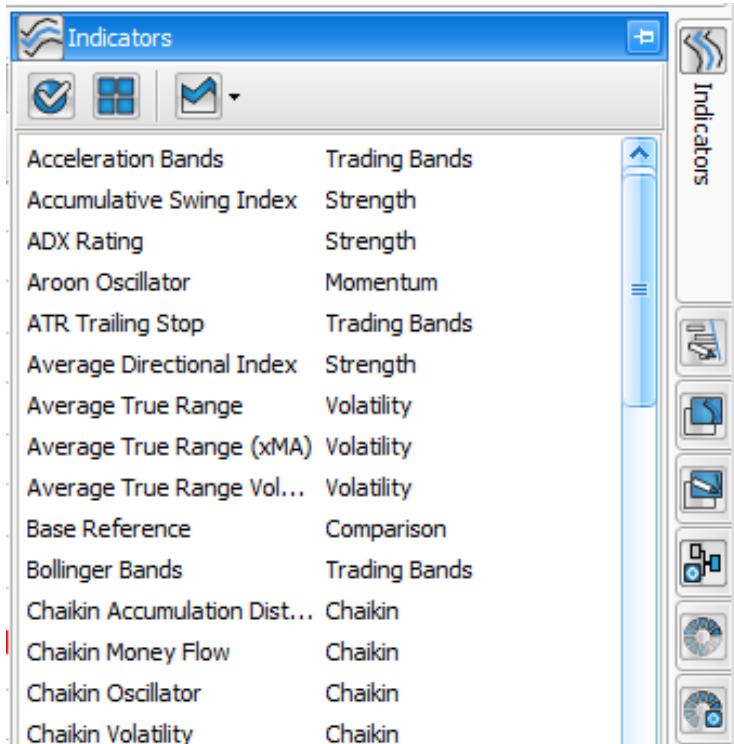
Fig.1.1

Notice that the act of pinning a slide-out panel also causes all the vertical tabs in the group to appear at the bottom of the panel, now as horizontal tabs. Hover your mouse pointer over any one of them and a tool tip will be displayed with the panel name. Select that panel by clicking on the tab.
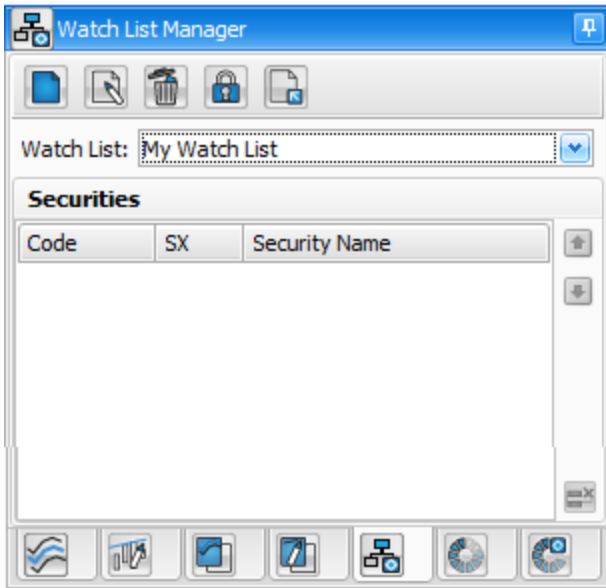
Fig.1.2

To close, or unpin a slide-out panel, click once on the vertical pin and move your mouse away from the panel. The slide-out panel will auto close.

1.1.3 Right-Click Access to Side Panels

You can access all the side panels quickly and easily by simply right-clicking on any white space on a chart. Selecting a side panel from the right-click menu will slide in and automatically "pin" the side panel so that it doesn't slide back against the side of the screen. Simply click the pin at the top right corner to "unpin" the panel.
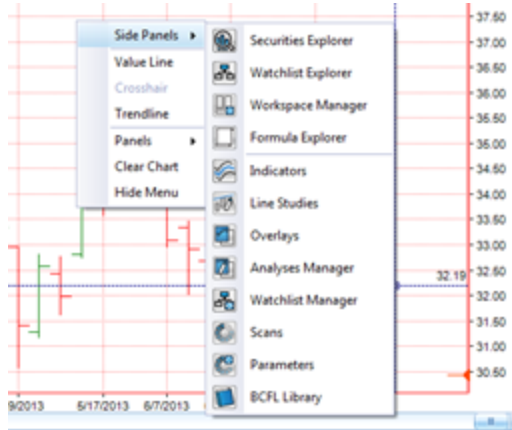
1.1.4 Panel Actions

At the top of every Panel is a Panel Menu, examples are shown in Fig.1.3 . The major actions associated with the contents of a panel can be applied from the Panel Menu. Tool tips describe the respective available actions (hover mouse over icon).
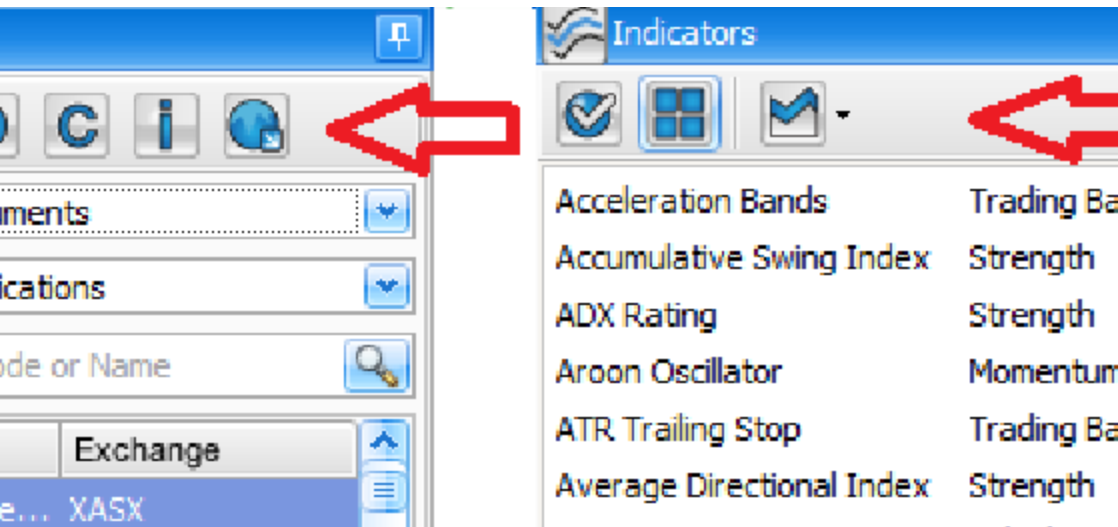
Fig.1.3

The main action for any panel can also be accessed by double clicking an item. For example, clicking on the chart symbol (4 bar icon at top left of the Securities Explorer) for charting a security from the Security Explorer or the apply button for applying an indicator from the Indicators panel.

1.1.5 Common Menus

Below is a list of the most commonly used menus:

- New

Clicking on the New button would simply mean adding new content into the Panel. When this menu is selected, Beyond Charts will prompt to provide a Name for this new item.

- Rename

Select the Rename option from the top of the Panel Menu or by right clicking on the item to change the current Name.

- Save

Clicking on Save will ensure that any changes made will be Saved permanently depending on which Panel have been selected. For example, if different indicators have been added for a saved Overlay Template, clicking on Save will allow the same settings to be viewed the next time the same Overlay is selected.

- Apply

Apply adds the selected item to a chart.

- Delete

The Delete button removes the selected item permanently from the selected Panel.

- Lock/Unlock

Within both the Watch List Manager and Watch List Explorer; **Lock** prevents any changes being made to a Watch List, unlock allows changes to be made

1.2 Windows

1.2.1 Window Actions

At the top of every Window is a Window Menu, examples are shown in Fig.1.4 . The major actions associated with the contents of a Window can be applied from the Window Menu.

Fig.1.4

The right click menu of a Window contains actions for the content of that window. It is context sensitive so only applicable actions will be visible.

The main action for any window can also be accessed by double clicking an item. For example, Charting a Security from a row in the Data Sheet.

1.2.2 Window Size and Position

When you open a window it will automatically create a tab called the document manager. If you open new windows, they will be tabbed in the document manager. If there are other windows besides charts and datagrids, they will occupy space beside the document manager. You can adjust the size and position of each window into an arrangement that suits you, as shown in Fig.1.5 . Pinning a panel open will reduce the amount of available horizontal workspace.

Workspace 1 - Beyond Charts

Licence Version Help Tutor
         Check   Me

Tools

Share Information :

Security

Type Description

Type

Instrument

SX

Security Name

Code

Last Price Statist

52 Week High Price

52 Week Low Price

52 Week High Date

Dividends : BHP.XNY

Ex Date ▽	P

1 GENERAL TERMS

Fig.1.5

To move a window to a new location:

- Click and drag the window title bar or window tab and drag the window away from its current position. As you drag it away and hover over an existing window, an array of location arrows will appear, as shown in Fig.1.6 . Drop the window onto the arrow that indicates where the window will be positioned.

The location arrows in Fig.1.6 produce these results:

- By using the Left, Right, Top and Bottom arrows in the centre section of the array, a window can be attached and positioned to the Left, Right, Top or Bottom of an existing window. It effectively splits the existing window into equal portions.

- By using the Left, Right, Top and Bottom arrows on the outside of the array, a window can be attached and positioned to the Left, Right, Top or Bottom of the entire workspace. It effectively splits the workspace into equal portions based on the number of existing windows.

- By using the Tab icon in the centre of the array, a window will tabbed with the existing window. This is useful for having multiple windows open that require large amounts of screen space.

When a number of windows are tabbed into a group the order of the tabs can be adjusted. To change the order:

- Click and drag a tab to a new location within the group.
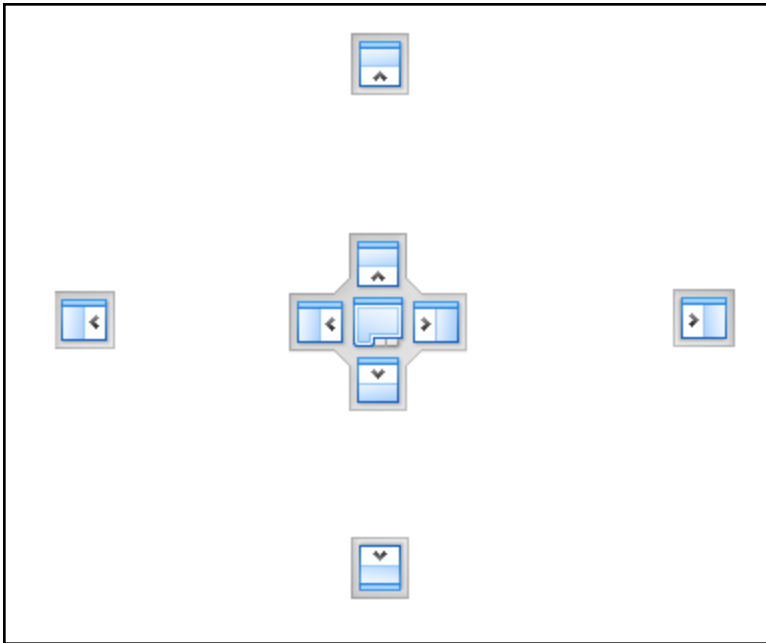
Fig.1.6

1.2.3 Parent / Child relationships

The Chart Window acts as a parent to all windows accept for the Market & Sector Risk and Trade Script Editor Windows. The explanations about the relationship of each window are available in - Windows > Chart. Further explanation on how to utilize the feature such as the type of Window Menus, Window Size/Orders and Window Tab are detailed below.

1.3 Tables

Many of the Windows and Panels in Beyond Charts contain tables to display data in a grid format with columns and rows, such as in Fig.1.7 . Significant examples of these are:

- Data Sheet window,
- Security Explorer panel,
- Dividends window, and the
- Watch List Manager panel.

Code	Security Name	SX	GICS Sector	Open	High	Low	Close	Ty
AMP	AMP Limited	XASX	Financials	4.770	4.800	4.690	4.750	Fu
ANZ	Australia and New Zealand Banking Group Limited	XASX	Financials	21.520	21.640	21.450	21.600	Fu
BHP	BHP Billiton Limited	XASX	Materials	43.150	43.330	43.040	43.150	Fu
CBA	Commonwealth Bank of Australia.	XASX	Financials	51.190	51.380	51.030	51.370	Fu
CSL	CSL Limited	XASX	Health Care	31.980	32.560	31.860	32.300	Fu
FGL	Foster's Group Limited	XASX	Consumer Staples	5.170	5.170	5.160	5.160	Fu
NAB	National Australia Bank Limited	XASX	Financials	25.000	25.180	24.900	25.180	Fu
NCM	Newcrest Mining Limited	XASX	Materials	36.950	37.290	36.780	37.100	Fu
QBE	QBE Insurance Group Limited	XASX	Financials	17.230	17.270	16.910	17.040	Fu
RIO	Rio Tinto Limited	XASX	Materials	81.500	81.860	81.390	81.530	Fu
SUN	Suncorp Group Limited	XASX	Financials	8.080	8.080	7.980	8.010	Fu
TLS	Telstra Corporation Limited	XASX	Telecommunication Services	2.920	2.930	2.860	2.890	Fu
WBC	Westpac Banking Corporation	XASX	Financials	21.940	21.940	21.630	21.820	Fu
WES	Wesfarmers Limited	XASX	Consumer Staples	30.980	31.380	30.920	31.240	Fu

Fig.1.7

The actions available through a table provide a powerful way to view, sort and filter data. The following sections will detail the actions and properties that are available in a table.

Note: Not all actions are available on all tables. For example, you can apply a filter in the Data Sheet window but not in the Securities Explorer panel.

Many of the table actions and properties are available from the right click menu on the Column Header. If a table function is not available, the item will not be visible on the right click menu.

The right click menu for the Column Header will typically be:
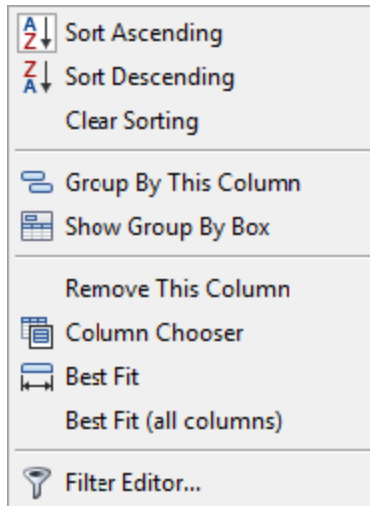
Fig.1.8

1.3.1 Navigation Bar

At the bottom of most tables is a Navigation Bar as shown in Fig.1.9 , which allows rapid navigation through a table that contains many records. It is an alternative to the vertical scroll bar. Included on the bar are:

- The current record number and a count of the total number of records.

- Navigate to the Next or Previous record.

- Navigate to the First or Last record.

- Navigate to the Next or Previous page.

Fig.1.9

1.3.2 Column Width
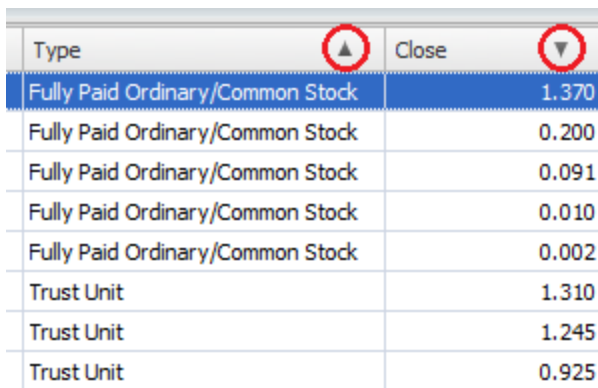
You can alter the width of columns by several methods:

- Left click and drag the vertical separator between any two Column Headers.

- Right click the specific Column Header and select Best Fit. The specific column will be resized to fit the longest content, if possible.

- Right click any Column Header and select Best Fit (all columns). All columns will be resized based on the total available horizontal space. This may mean that some contents are visually truncated.

Note: Hovering over a partially displayed column name will display it in full.

1.3.3 Sort ascending/descending order

The sort order of a column is denoted by a triangle symbol displayed on the Column Header; pointing upwards (ascending) or downwards (descending).

Type	Close
Fully Paid Ordinary/Common Stock	1.370
Fully Paid Ordinary/Common Stock	0.200
Fully Paid Ordinary/Common Stock	0.091
Fully Paid Ordinary/Common Stock	0.010
Fully Paid Ordinary/Common Stock	0.002
Trust Unit	1.310
Trust Unit	1.245
Trust Unit	0.925

Fig.1.10

You can sort columns by several methods:

- Right click the specific Column Header, and select Sort Ascending or, Sort Descending. This method allows sorting to be applied to multiple columns.

- Left click on a specific Column Header to sort in ascending order and left click again to sort in descending order. This will clear any sorting applied to other columns.

To clear sorting on a column and revert back to the default state:

- Right click the specific Column Header and select Clear Sorting.

1.3.4 Show a column using the Column Chooser

A standard table does not always show all the columns that are available. To see what additional columns are available and then show those in the table use the column chooser:

- Right click on any column header and to select Column Chooser.

The small Column Chooser window will appear. To show a column from the list you may:

- Double click the name which will automatically show the column in its default position, or

- Manually drag and drop the column to the desired location on the Header row.

1.3.5 Remove a column

To remove a column from a table you may:

- Right click on the Column Header and select Remove This Column.

- Drag and drop the Column Header back into the opened Column Chooser window.

- Drag and drop the Column Header into the table area, anywhere below the Header row.

2

MAIN MENUS

Along the top of the Beyond Charts Screen there is an Application Menu and three Main Tabs entitled Home, Chart and Systems, each with their own ribbon of selections.

Double clicking either of the three Home, Chart and Systems tabs will hide the ribbon, providing additional screen space. Another double click will unhide the ribbon.

The following topics are covered in this chapter:

- Application Menu
- Home - Tab
- Chart - Tab
- Systems - Tab

2.1 Application Menu
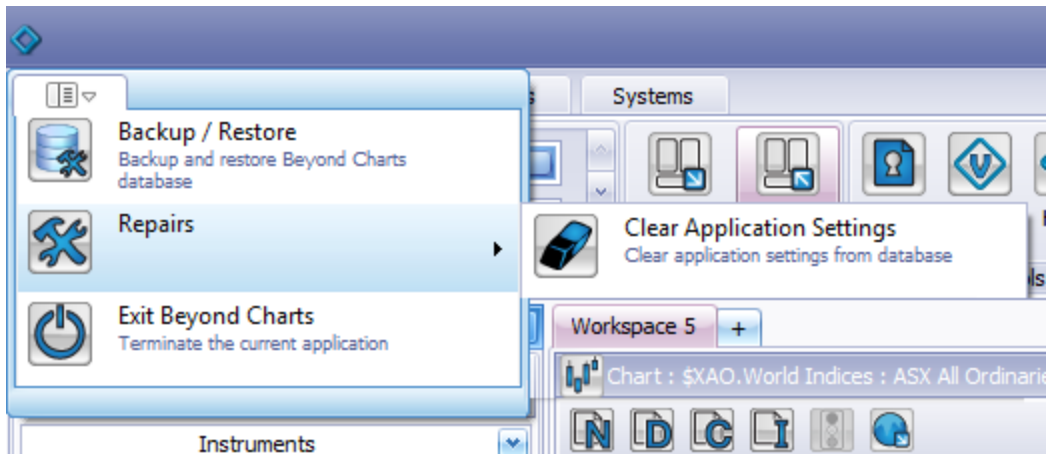
Fig.2.1

The Application Menu gives users access to advanced system functionality of Beyond Charts.

2.1.1 Backup / Restore
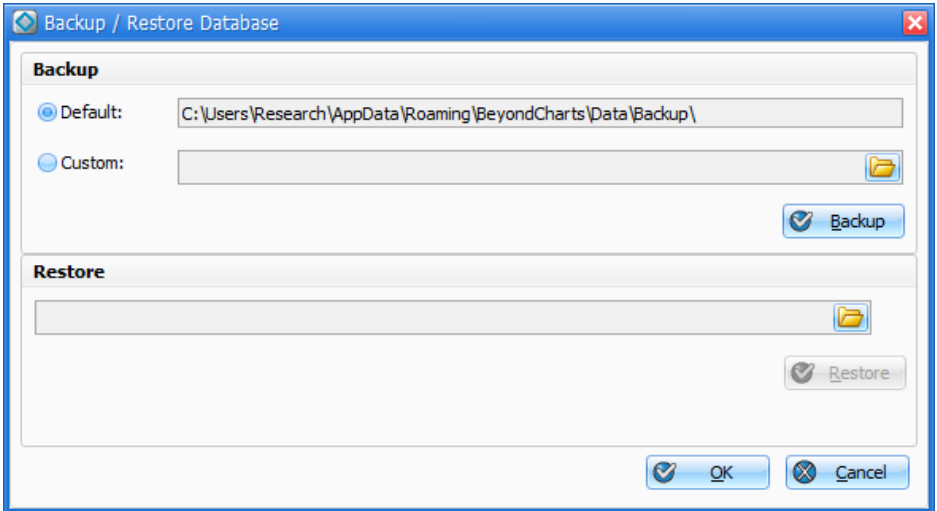
Fig.2.2

2.1.1.1 Automatic Backup

Beyond Charts will automatically keep a backup of the database containing all the settings with the program. Upon each close of Beyond Charts, a backup will be taken of Beyond Charts' database.

A pre-defined number of Daily, Weekly, Monthly and Yearly backups are maintained, should the need arise to restore from a past backup. Once the set number of backups for each increment is met, the oldest backup is deleted and replaced with the newly created.

The Automatic backup can occur to either the Default backup location or Custom backup location defined by the user. This allows the user to specify the location in which the backups occur automatically.

If for example the user specified an external drive or USB drive, Beyond Charts would automatically create backups to that location as long as it was available. If the drive was disconnected for whatever reason, the Automatic backups would default back to the default location, until which time the Custom location became available again.

To change from the default location to a custom location, simply click the Select backup location browsing folder on the right of the Custom path field, and select the preferred backup location from the dialogue shown in Fig.2.3 . Clicking OK at the bottom of the Backup / Restore window will save this setting.
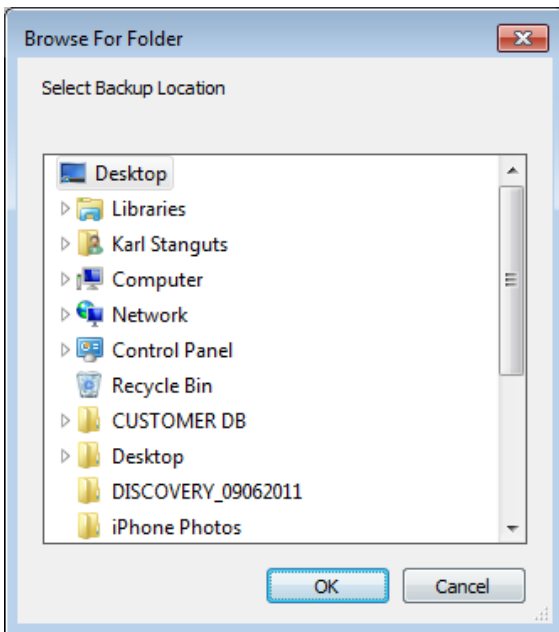
Fig.2.3

2.1.1.2 Manual Backup

Users can also manually backup the Beyond Charts database to either the default location or Custom (user defined) location whenever they wish.

This is useful for users that wish to create a backup of their database(s) manually before moving them to a second computer.

To create a manual backup, simply ensure your preferred location is specified, either the default location, or a custom location and click the backup button as shown in Fig.2.4 .
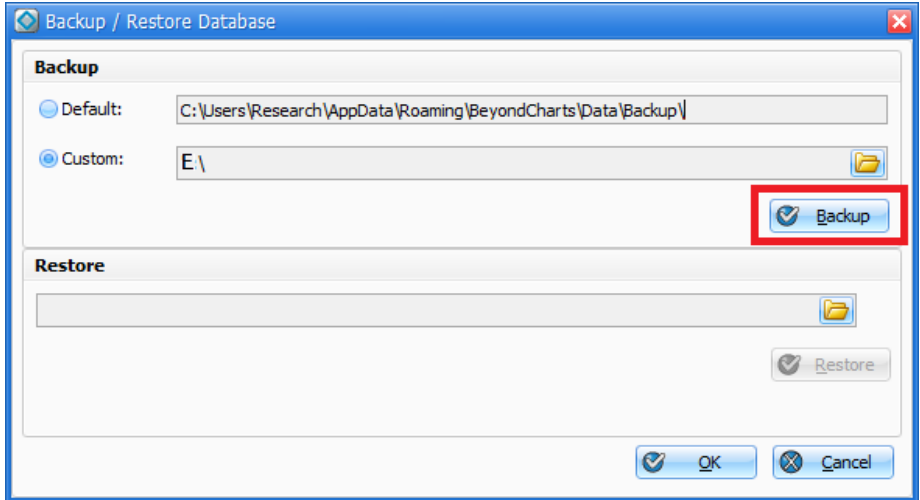
Fig.2.4

2.1.1.3 Restore

The Restore database function allows a user to revert to a backup if needed, or to update a second computer with a backup taken from their current computer.

To restore from a backup, click the Select file to be restored browsing folder to the right of the restore field and browse to the required backup file.

Once loaded, the user can specify which database(s) they wish to restore:

Beyond Charts user

- ○ Beyond Charts

Once the relevant database field(s) are ticked, simply click Restore as shown in Fig.2.5 .
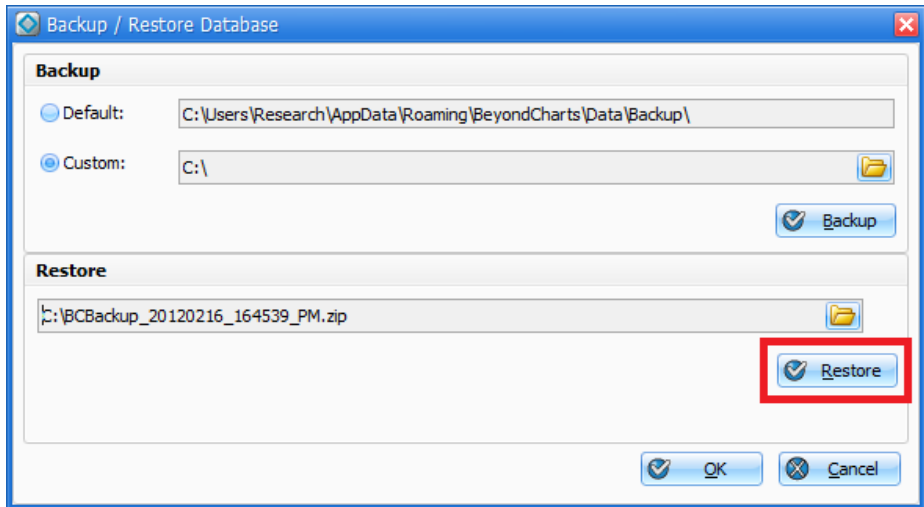
Fig.2.5

Beyond Charts will then restore the required database(s) and prompt to restart. Upon starting Beyond Charts again, the recently restored database and all its settings contained within it will be available within the program.

2.1.2 Repairs

The Repairs option in the application menu has one function:

- Clear Application Settings

Clear Application Settings allows the user to clear out any saved Application Settings they have saved as part of the Workspace functionality. This will remove all user saved preferences, allowing a blank canvas for the user to re-establish saved Application Settings.

2.1.3 Exit Beyond Charts

This will close Beyond Charts. The same can be achieved using the standard Windows functionality of using the red cross in the top right corner of the application.

2.2 Home – Tab

The Home Tab typically contains functionality that has to do with the 'big picture' of using Beyond Charts. Each Menu added, will be explained in this section.

Fig.2.6

The following sections are available on the Home tab ribbon:

2.2.1 Main
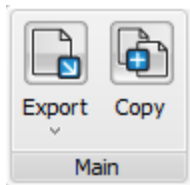
Fig.2.7

When Beyond Charts is first opened the Export and Copy menus will be disabled. The Import menu is provided to allow users to Import Market Master Notes and will only be relevant to users that previously used Market Master.

2.2.1.1 Export

The Export menu usually will be enabled when a Datasheet or Scan Result Window is open for viewing.

The data can be Exported to seven different file formats:

- PDF
- HTML
- TEXT
- XML
- CSV
- XLS
- XLSX

2.2.1.2 Copy

In order to copy the selected text or chart to the clipboard, click on the Copy Menu.

2.2.2 Print
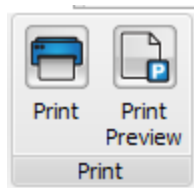
Fig.2.8

The next option after the Main Menu is the Print Menu. The Print menu will only print an active window. For instance, If several windows were open at the same time such as Chart, Data Sheet and Share Information then the Print selection will only print the window selected. The Print Preview Menu allows the user to edit the Page Setup, add Background Colour, Export file, Zoom or Navigate before printing.

2.2.3 Look & Feel

Fig.2.9

The Beyond Charts, Look & Feel menu refers to the graphical user interface which comprises aspects of its design, including elements such as colours, shapes and layout. The Look and Feel menu allows the user to change the interface base on preference or a change of environment. To identify the type of design, mouse hover to each frame design to view the text or click to view the changes. Clicking on to the scroll bar in the Look and Feel menu will show for more option.

The default frame designed for Beyond Charts is called iMaginery.

2.2.4 Workspace

Fig.2.10

The Workspace menu allows the user to Save and Load either predefined or on-the-fly Application and Window layouts when Beyond Charts first loads, or manually whilst Beyond Charts is open.

Users can have Beyond Charts save the windows they have open, the panels they have docked on closing, and reload them as they left it when Beyond Charts loads.

Workspace is covered in greater detail in chapter 5.

2.2.5 Tools
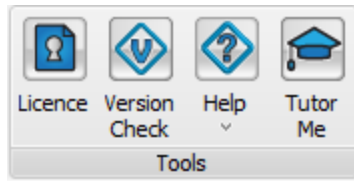
Fig.2.11

Tools menu consists of two items:

- Licence menu
- Version Check
- Help menu
- Tutor Me

2.2.5.1 Licence

Clicking on the Licence menu allows the user to view their User ID, User Type and Activation Key.

You can use Beyond Charts on a maximum of two computers at any given time. In case you need to use Beyond Charts on a third computer, you need to first deactivate one of the two computers by clicking the Licence button on the Home

tab of the menu ribbon then clicking Deactivate. This will release your licence
key and will allow you to install on a third computer.

This means that the user can install Beyond Charts on an unlimited number of
computers but two instances of the application can be used at any given time.
Alternatively, if an additional licence key is required users are recommended to
contact Beyond Charts to enquire about acquiring an additional key for
simultaneous use.

Note that your information and preferences will not be synchronized between the
computers that you use. You have to manually update each computer by
mirroring the settings and preferences or by backing up the updated information
and importing on the other computer.

2.2.5.2 Version Check

The Version Check option in the Home tab takes the user to the Members Zone
and confirms whether or not they are running the latest version of the software. If
Beyond Charts is out of date, instructions will be displayed on screen to upgrade
to the latest version.

This Version Check option may also be done by simply hovering your mouse over the Version Check button and a tool-tip will appear showing the currently installed version, as shown in Fig.2.12 .
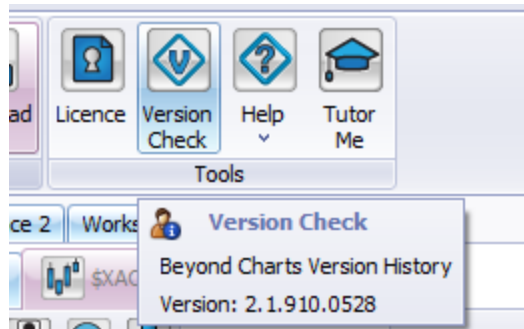
Fig.2.12

2.2.5.3 Help

The Help menu provides the Beyond Charts End-User Licence Agreement for the Beyond Charts Software. Also, the Help menu links to all the necessary Beyond Charts online manuals:

- Beyond Charts Getting Started
- Beyond Charts Reference
- Tutor Me

2.2.5.4 Tutor Me

The Tutor Me button takes the user to the Beyond Charts online Education, Tutor Me. Users can view video content to further their knowledge of Beyond Charts.

It is strongly recommended that EVERY new user to Beyond Charts uses the video content on navigating around Beyond Charts. The videos are to the point and the content contains more detail than the text documentation.

2.3 Chart – Tab

The Chart Tab contains functionality that pertains to using charts such as Daily, Weekly and Monthly data mode, Chart Styles, Signals, Saved Analyses and Zooming.
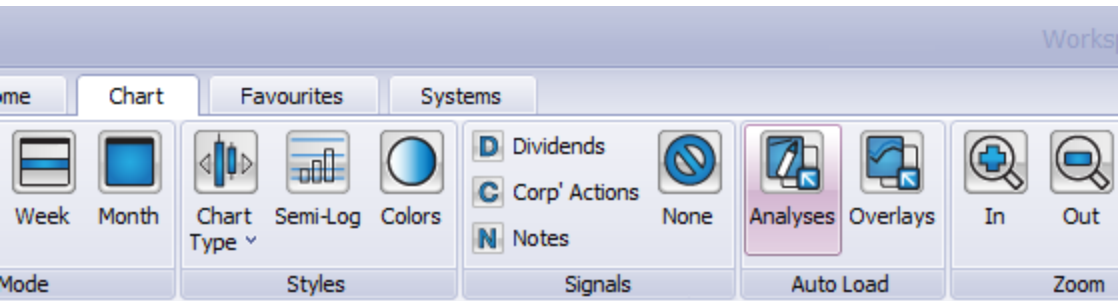
Fig.2.13

The following sections are available on the Chart tab ribbon:

- Data Mode

- Styles

- Signals

- Auto Load

- Zoom

2.3.1 Data Mode

2.3.1.1 Period

The period can be changed based on the following options:

5 Years 10 Years 15 Years	The number of years is calculated ret- rospectively from the last trading day.
1300 Bars	The number of bars refers to the number of

2600 Bars 6500 Bars	trading days from the last trading day.
All Data	Start date of listed companies until the last trading day.
Custom Custom Settings	Users can specify the number of Years, Bars or Dates manually.

Fig.2.14

To choose an option, click on the selection and a tick mark would appear on the left side of the text.

The Initial Visible Bars option in the Period menu, allows the user to set the initial zoom when the chart loads. The default of 260 bars will show approximately 12 months as the initial zoom, but users can set this to their own requirements using bars, days, weeks, months or years.
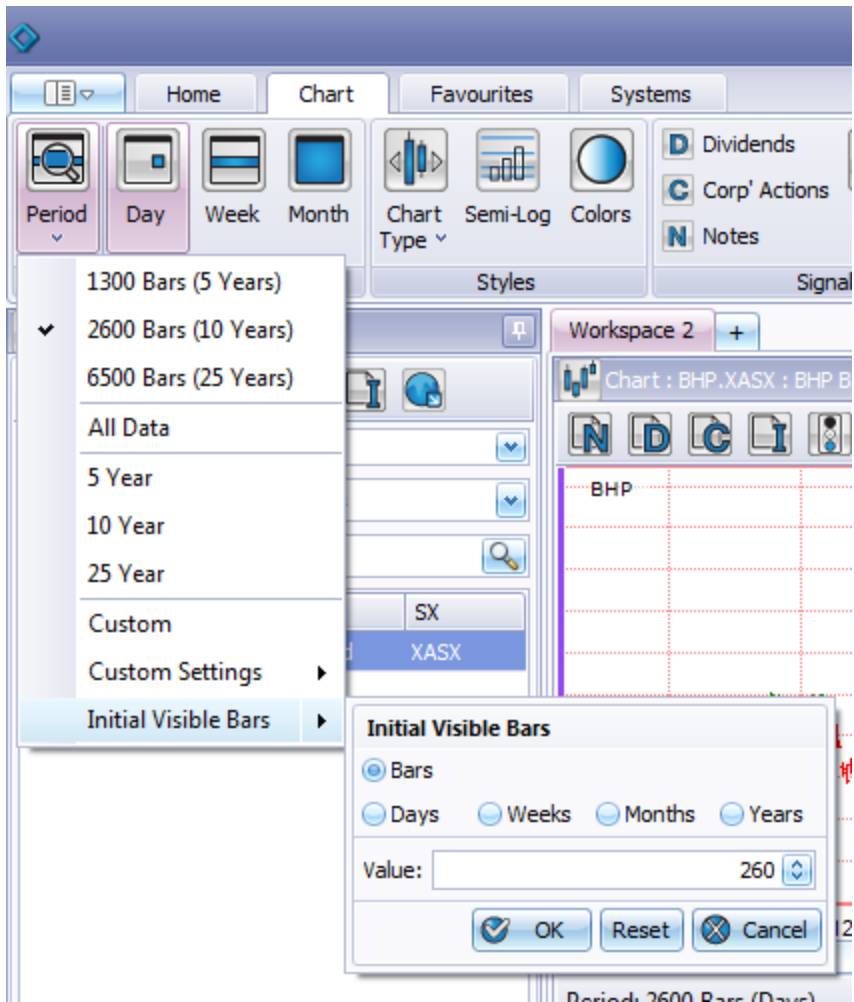
2.3.1.2 Data Mode
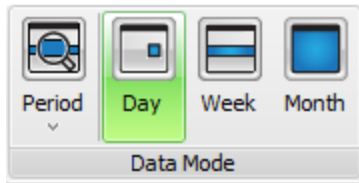
Fig.2.15

The Data Mode section is provided to filter the periodicity on a Chart. To select a particular period, click on the relevant period. The selection made will be highlighted in green as shown above.

2.3.1.3 Day

The Day view displays daily trading bars from Monday until Friday and excludes public holidays that are not official trading days.

2.3.1.4 Week

The Weekly view will display the last trading day in a week per bar which will be a Friday unless Friday of that week is a non-trading day for the applicable stock exchange.

2.3.1.5 Month

The Monthly view will display the last trading day of every Month per bar.

2.3.2 Styles

The Styles menu will list all the available Chart Types in Beyond Charts. If a Chart Type is temporarily unavailable or intended for future development, the selection will be disabled.

Fig.2.16

2.3.2.1 Chart Type

There are 5 types of Chart currently available in Beyond Charts:

- Bar Chart
- Candlesticks
- Line Chart
- Line Chart (Coloured)
- Renko

Candle Chart users have the ability to modify the candle colours and spacing (0,1,2) to their preference via the Candle Chart Settings option once Candle Chart is selected as the Chart Type.

Bar Chart spacing (0,1,2) may be modified to their preference via the Bar Chart Settings option once Bar Chart is selected as the Chart Type.

2 MAIN MENUS

2 MAIN MENUS
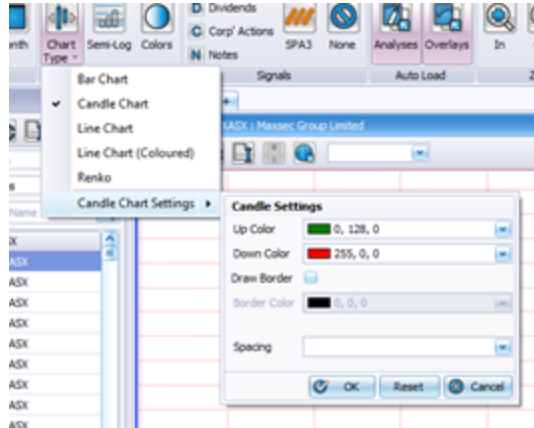
The following are on the list for inclusion in the not too distant future:

- Point and Figure
- Kagi

To make a selection, click on the Chart Type and a tick mark will be displayed on the left side of the Chart Name.

Candle Chart users also have the ability to modify the candle colors to their preference via the Candle Chart Settings option once Candle Chart is selected as the Chart Type.

Users can change the Up & Down color along with the border color if desired.

Trend lines can also be drawn on indicators that are inserted in panels below the price chart.

2.3.2.2 Semi-Log

This option enables Semi-Log mode on the active chart. Once enabled, the Semi-Log button is highlighted and the chart's scaling will reset to Semi-Log scaling.

2.3.2.3 Colours

The Colours option allows the user to specify their preferred chart background, chart gridline and chart label colours. This is especially useful for those users that prefer a dark background on their charts over the default white.

To change the colour settings of the chart, click the Colours button under the Styles section of the Chart tab. The dialogue window in Fig.2.17 will appear and allow the preferred colours to be set.
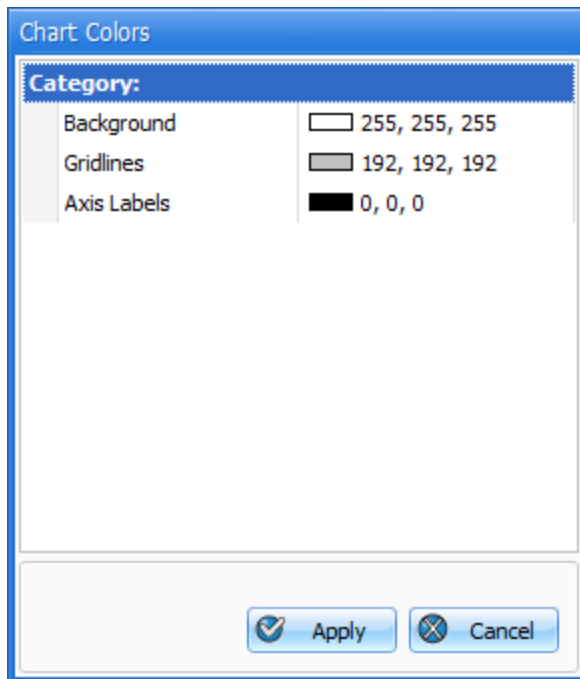
Fig.2.17

If a chart is open when the colours are being selected within the Chart Colours dialogue window, the chart will preview those changes prior to applying, allowing the user to see the changes before committing as shown in Fig.2.18 . If Apply is

selected, those changes are saved. If Cancel is selected, the chart reverts back to the previous colour settings.
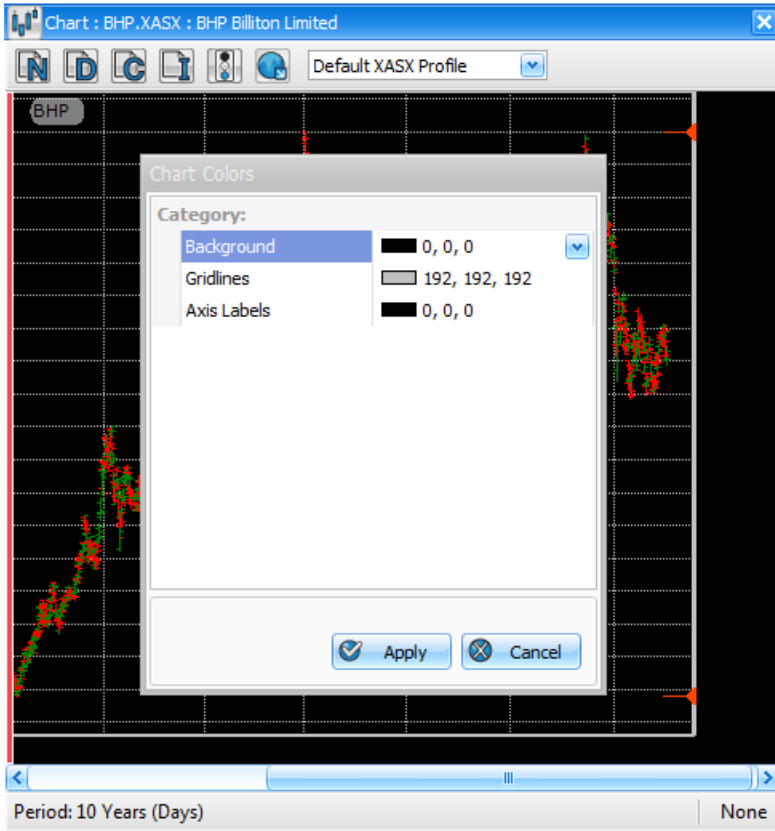
Fig.2.18

2.3.3 Signals

The Signals section allows the user to display or disable Signals on a Chart. To choose the option, click to highlight the selection as shown on Fig.2.19 .
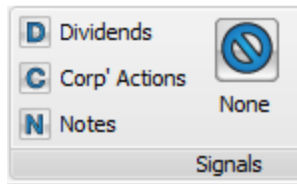
Fig.2.19

The appropriate 'signal' selected from Fig.2.19 , will be displayed at the bar that corresponds to the date that the 'signal' occurred.

There are 6 different types of Signal:

- Dividends
- Corporate Action
- Notes
- None – This menu is to clear all signals on chart.

2.3.4 Auto Load
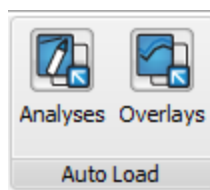
Fig.2.20

2.3.4.1 Analyses

With the AutoLoad Analyses button enabled, each time a chart is opened, either automatically in a Workspace load or when a user manually loads a chart / watchlist, if a default analyses is set for that partcular security, it will load onto the chart when it loads. This is useful for users wanting to display their default analysis automatically without the need to manually apply via the Analyses Manager.

2.3.4.2 Overlays

With the AutoLoad Overlays button enabled, when a chart is opened via a Workspace load, if an Overlay was applied to the chart when the workspace was saved, it will be recalled automatically.

2.3.5 Zoom
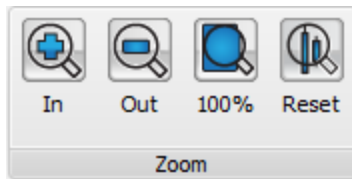
Fig.2.21

When a chart is first opened Beyond Charts will display a default number of bars on the chart. Zooming is graphical functionality that allows users to view more or less historical data in the available charting window. There are 4 menus for zooming:

- In
- Out
- 100%
- Reset

2.3.5.1 In

To Zoom In, point the cursor to the desired area on the chart, drag the cursor (a dotted vertical line will appear on chart) and then release the mouses left click button. The chart will then display the exact area selected.

Another method is to click on the In menu (keep pressing on left click button of the mouse), then simply release the mouse button once the desired zoom level is reached.

Pressing the '+' key on the numeric pad and keeping it depressed will also zoom in until the '+' key is released.

2.3.5.2 Out

Zoom Out is the opposite of Zoom In, depressing the Out in the Zoom menu will increase the amount of price history displayed on the chart.

Pressing the '-' key on the numeric pad and keeping it depressed will also zoom out until the '-' key is released.

2.3.5.3 100%

To view the entire chart from the first trading bar for any given chart, to the last trading bar, click on the 100% icon.

The user can also left click anywhere in clear space on the chart and drag the mouse to the left then release. All available data for that chart will be displayed.

2.3.5.4 Zoom Reset

Zoom Reset restores the chart to the Initial Visible Bars that the user has specified in the Period menu. Resetting the zoom is achieved by clicking Reset in the Chart Tab or clicking your mouse scroll wheel.

2.3.6 X and Y Axis Resizing

Users are able to easily resize the padding around a chart for purposes of visual analysis. This can be done by dragging the red levers than can be found near the

top-right and bottom-right corners of your chart.
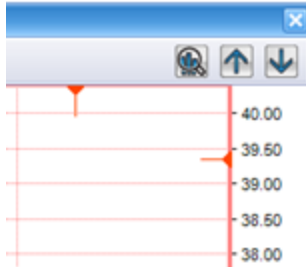
When you drag a Value Line or Crosshair onto the padding area, it turns into a dotted floating crosshair that can help you project prices in future dates. An approximate date is displayed at the foot of the vertical line and the price is displayed at the right end of the horizontal line.

2.3.7 Data Window
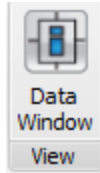
The Data Window displays the Open, Low, High, Close and Indicator Values on a chart to reduce the clutter on the screen and is an alternative to using the Value Line to show individual values. Click on the Data Window Icon in the Chart tab to launch the window then an open chart for the values to populate.
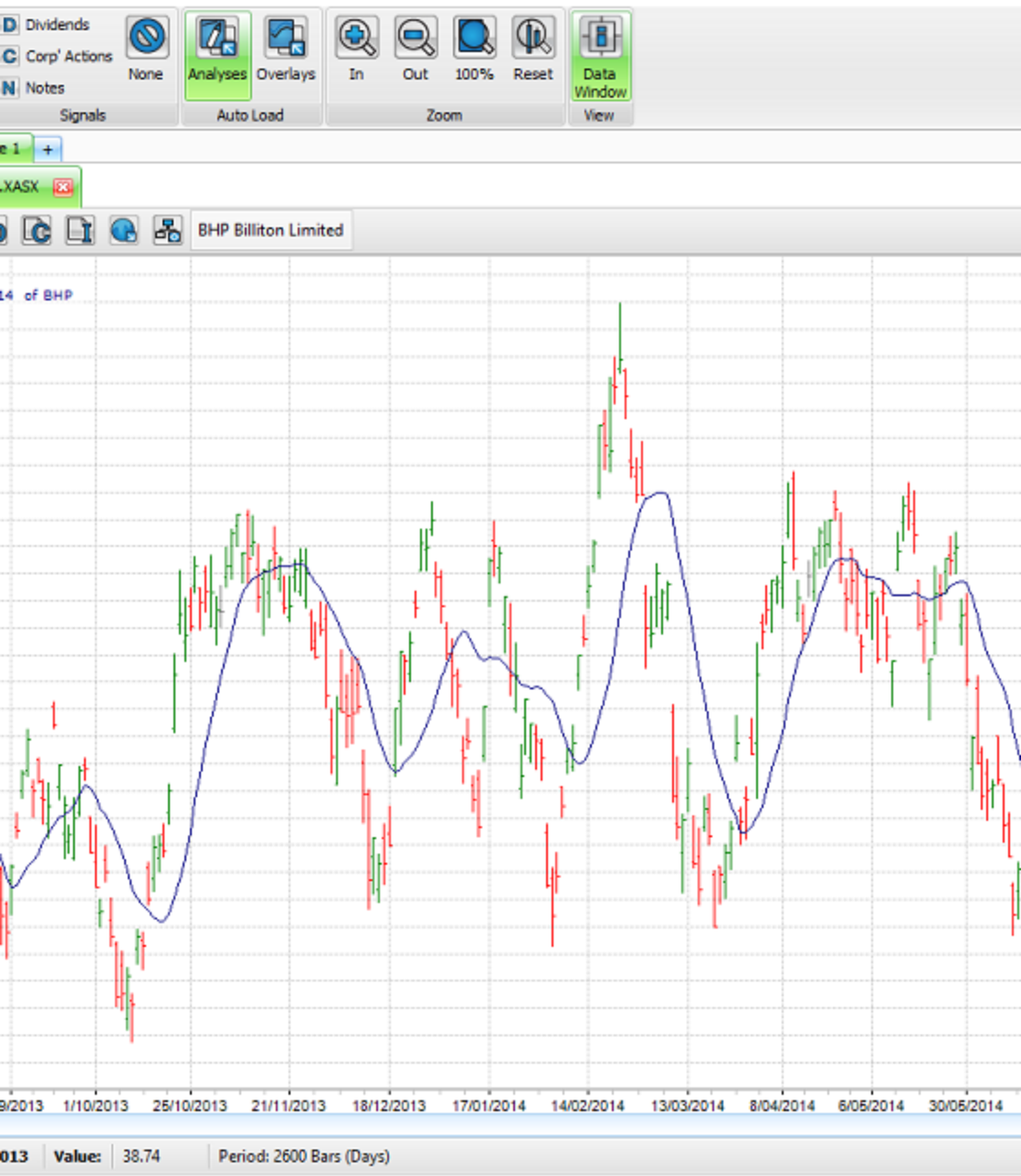
2 MAIN MENUS

The data window's position and size will be recalled each time the data window is opened.

2.4 Favourites – Tab

You can store the features that you use the most in the Favourites tab on the menu ribbon at the top.
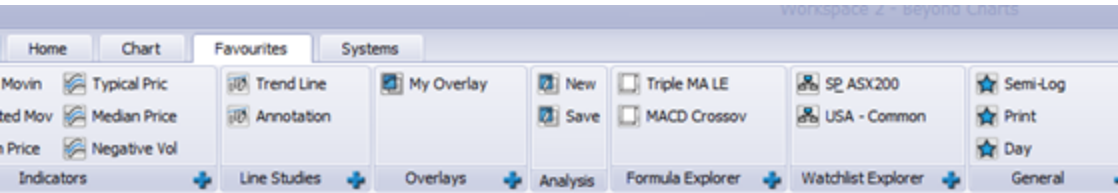
To add a new favourite, click on the "+" icon on the lower right hand corner of each category and choose from a list of applicable items.
Right-clicking an existing item will allow you to either rename or remove it.
Removing a favourite will create an empty slot where you can insert a new favourite by clicking the "+" icon and selecting a new item.
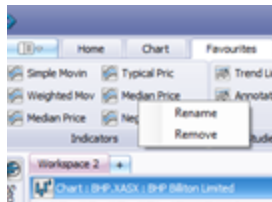
The Favourites Tab can be set up with all of the user's 'favourite' features and functions such that it is the tab that is used nearly all the time when using Beyond Charts.

2.4 Systems – Tab
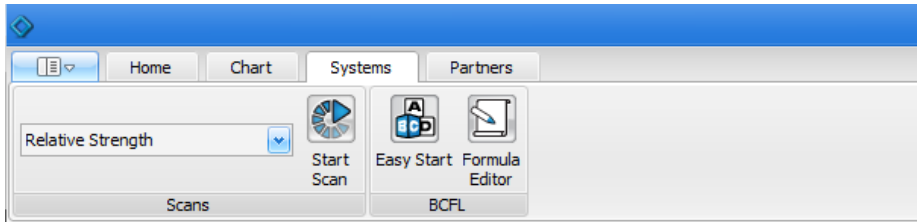
Fig.2.22

The Systems tab pertains to trading systems and methods. As a default, the System tab contains the scans available to you. The Relative Strength Scan comes with Beyond Charts +.

The following sections are available on the Systems tab ribbon:

- Scans
- BCFL (Beyond Charts Formula Language)

2.4.1 Scans
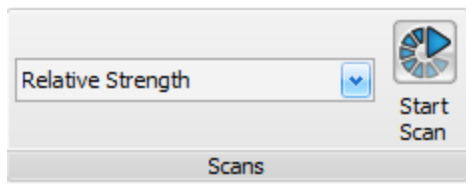
Fig.2.23

The Scans section is a shortcut to simplify the usage of the Scans panel without making any changes to the pre-set parameters. To change any scan parameters, see section 3.8 - .

To select which Scan to run, click on the drop down menu. These Scans can be Relative Strength Comparison (RSC) or BCFL Scans.

To Start Scan for a profile, ensure that the correct profile name has been selected from the drop down Menu. In some cases, if the Start Scan menu is disabled then the parameter settings for that particular profile in the Scans panel maybe incomplete or empty. To ensure the settings for the profile are complete and correct, refer to section 3.8 -

2.4.2 BCFL (Beyond Charts Formula Language)
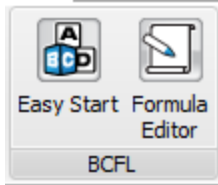
Fig.2.24

Easy Start

Easy Start is a pre loaded environment that makes using BCFL easy. We've taken the panels and objects that are mostly required within BCFL and delivered them in a pre-loaded work space. Each panel and object can be accessed independently but Easy Start preloads the entire BCFL environment and puts the core functionality at your fingertips.

Easy Start opens all the relevant windows involved in using the BCFL environment:, functions, formula writing and back testing and delivers this all through an intuitive and User friendly environment.

Formula Editor

Rather than pre-loading the entire 'Easy Start' environment, you can create and edit formulas by loading just the 'Formula Editor'. The Formula Editor is more of a power tool for people who understand the formula language.

For detailed explanation on how to navigate around the Beyond Charts Formula Language, refer to the BCFL Reference Manual which is accessible from the HOME tab, HELP in Beyond Charts.

3

PANELS

The following topics are covered in this chapter:

- Securities Explorer
- Watch List Explorer
- Workspace Manager
- Formula Explorer
- Indicators
- Line Studies
- Overlays
- Analyses Manager
- Watch List Manager
- Scans
- Parameters
- BCFL Library
- TradeScript

3.1 Securities Explorer

Key Words: Securities Explorer, Classification, Instruments, Search by Code or Name

The Securities Explorer panel contains all the securities and Watch Lists that are used throughout Beyond Charts. An individual security or sector of a market can be found by using the search tools provided. This topic explains the functionality and methods that can be used to search and display securities or groups of securities.
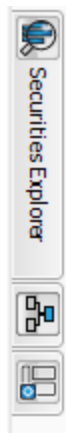
Fig.3.1

3.1.1 Securities Explorer – Menu Options

The top of the Securities Explorer panel displays icons for the following:

- ■ Chart
- ■ Data Sheet
- ■ Notes
- ■ Dividends

- Corporate Actions
- Share Information.
- News on Stocks

A detailed explanation for each of these icons is provided in section 4.1.11 - Windows > Chart > Chart - Menu.

3.1.2 Instruments
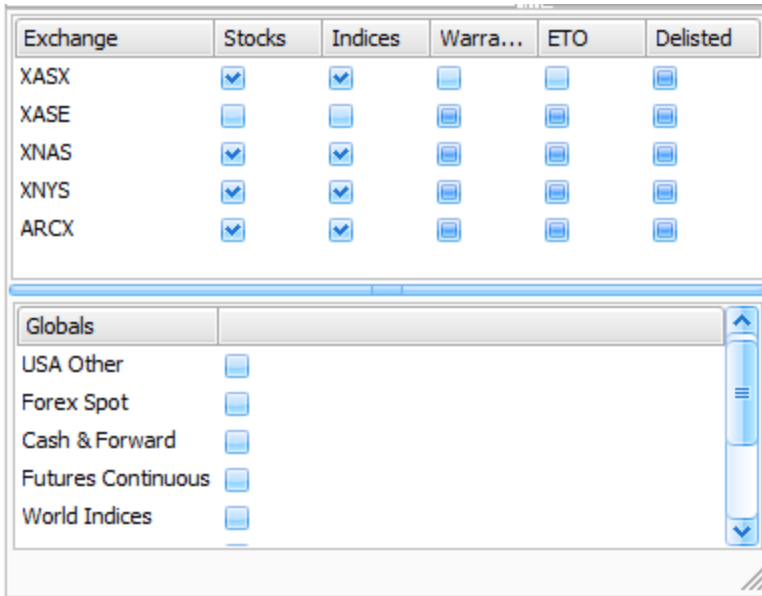
Fig.3.2

Click on the drop down menu alongside Instruments to display the available databases shown in Fig.3.2 .

To filter the instruments that will be available in the Securities Explorer, click on the available boxes. A tick mark represent that the selection has been made and to deselect the option simply un-tick the box. An immediate change takes place

in the security explorer at the background when any selection is made. Multiple selections can also be implemented at the same time.

SX – Stock Exchange
The following stock exchanges are currently available in Beyond Charts, depending on which exchanges the user is licenced for:

- XASX - Australian Stock Exchange
- http://www.asx.com.au/
- XJSE - Johannesburg Stock Exchange.
- http://www.jse.co.za/Home.aspx
- XNAS - NASDAQ Stock Exchange
- http://www.nasdaq.com/
- XNYS - New York Stock Exchange
- http://www.nyse.com/
- XASE – NYSE AMEX Equities
- ARCX – NYSE ARCA

The data downloaded for each stock exchange selected has been segregated into the following categories:

SX:

- Stocks
- Indices
- Warrant
- ETO
- Delisted
  - Stocks that are no longer listed for the particular exchange. This requires additional licencing

Globals:

- USA Other
- Forex Spot
- Cash & Forward
- Futures Continuous
- World Indices
  - The World Indices consist of all major indices around the world.

3.1.3 Classifications
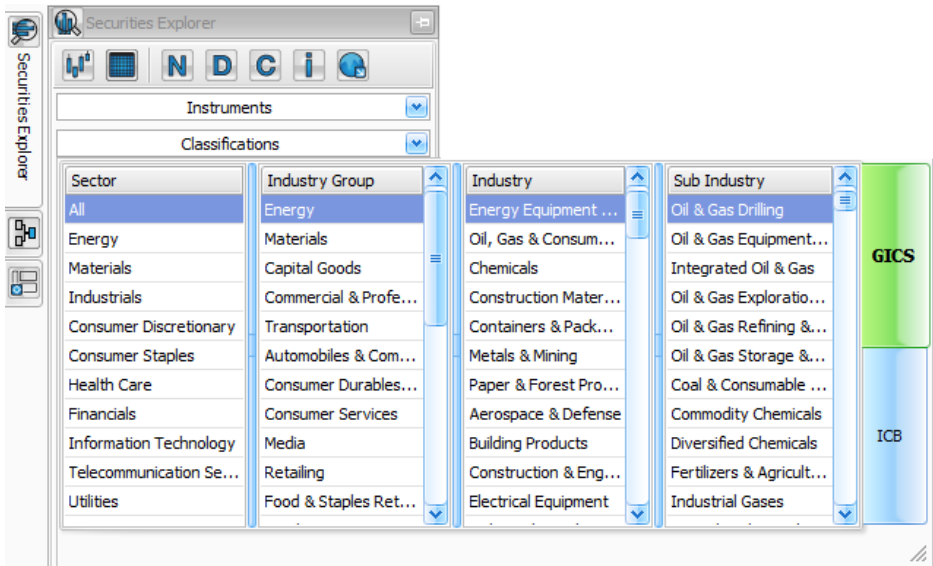
Fig.3.3

The Classifications option provides further filtering of the securities available for selection by sectors and industries. The Beyond Charts default setting is the

'ALL' sector for GICS. There are two main tabs that determine which sectors are displayed as shown in Fig.3.3 :

- GICS - Global Industry Classification Standard

http://en.wikipedia.org/wiki/Global_Industry_Classification_Standard

- ICB - Industry Classification Benchmark

http://en.wikipedia.org/wiki/Industry_Classification_Benchmark

These classifications are also use for scanning purposes. For example, if a New Entry scan is required, the 'ALL' sectors from the classification menu must be dragged & dropped into the Scans panel, Securities tab. For more information, see section 3.8.2 - .

3.1.4 Applying Filter on Classification

A filter will limit the scope of all actions in the Securities Explorer to a particular exchange or industry classification category within that exchange.

When a filter is applied, searching for a security will limit the results to within the filter's scope.
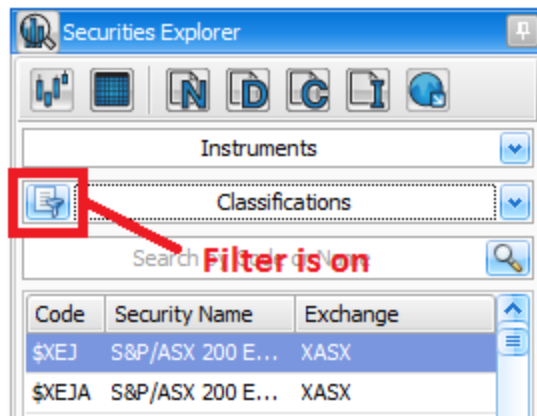
Fig.3.4
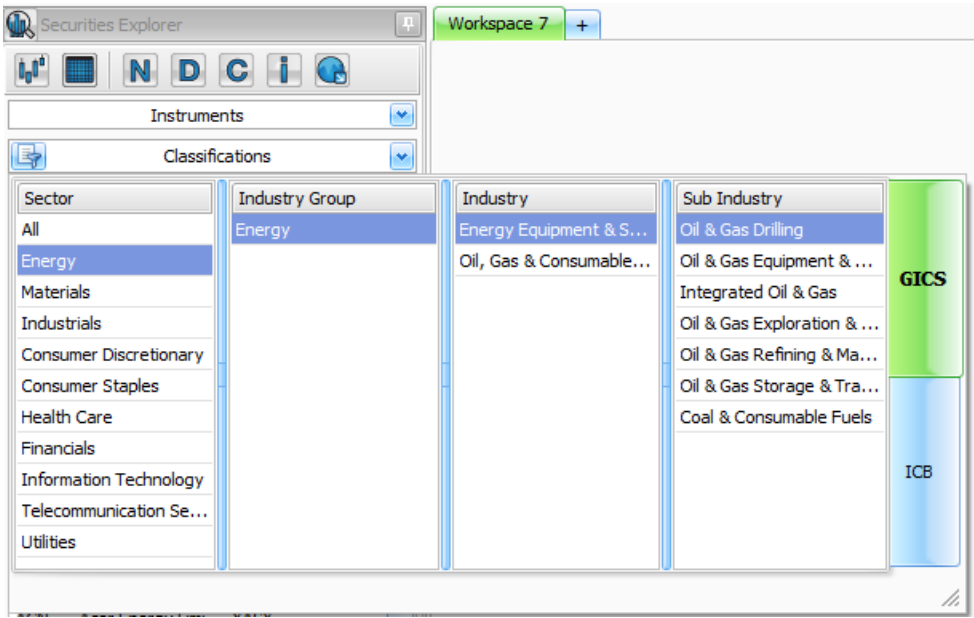
Fig.3.5

For example, filtering on the XASX and Energy category and searching for ORI displays the following securities.
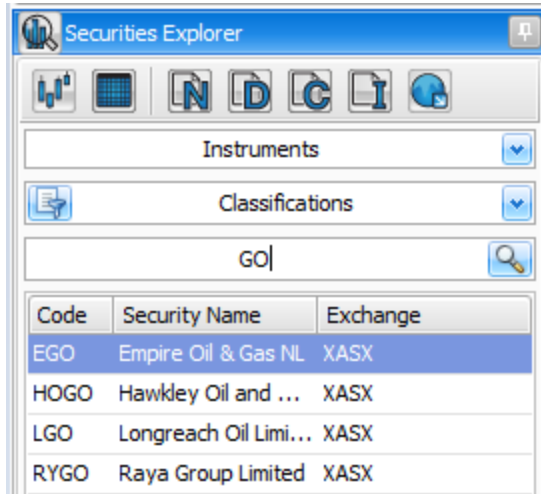
Fig.3.6

When a filter is applied, opening a group of charts will limit the charts available, in that window only, to within the filter's scope.

For example, filtering on the XASX and Energy category and then opening any single chart limits the charts in that window to the 315 securities in the Energy sector based on the total records found for the Energy Sector on the Securities Explorer window.
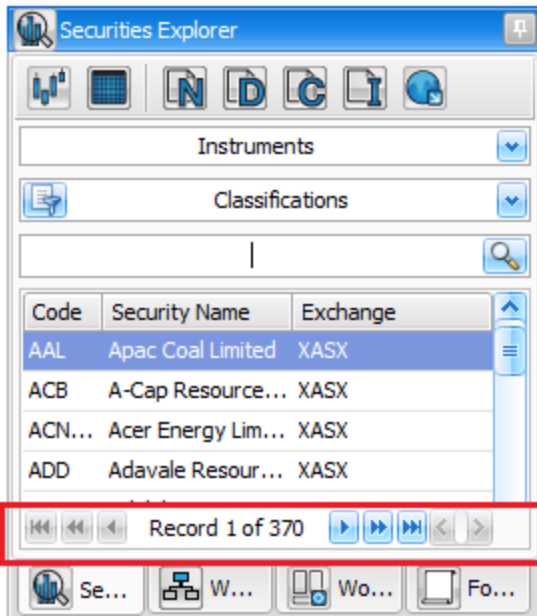
Fig.3.7

3.1.5 Search by Code or Name

The Search by Code or Name box allows the user to quickly find any security by entering a sequence of characters. The list will be reduced to only display those securities containing the character sequence within either the Security Code or Security Name.

For example, entering "WAT" finds the following securities.
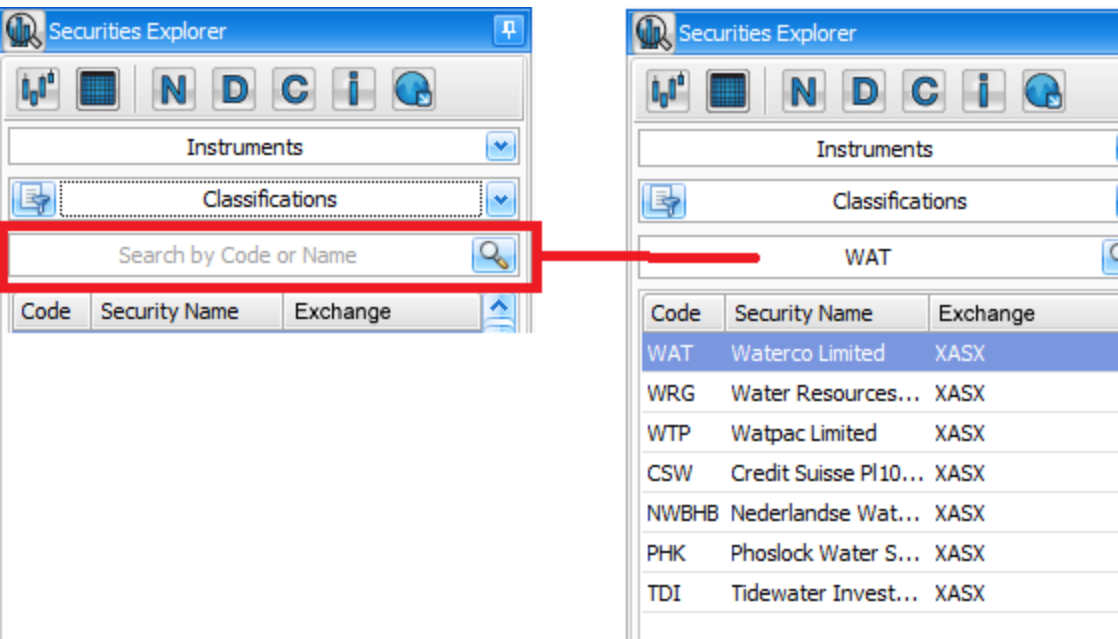
Fig.3.8

The Code or Name keyed-in can be undo, copied, pasted or deleted by right clicking or using the keyboard shortcut keys. Once the code has been correctly entered, press Enter to view the chart for the Security typed.

3.2 Watch List Explorer

Key Words: Watch List, Watch List Manager, Series

A Watch List contains a list of securities that have been grouped together for a particular reason. It allows your view of the market to be narrowed down to only those securities you are interested in. Often a Watch List is related to holdings in a portfolio, securities in a common industry sector or results of a Market scan.

Typical actions performed on a Watch List include; monitoring prices, scanning for buy and sell signals and viewing charts.

An individual security could appear in multiple Watch Lists, each for a different reason.

A Watch List may even contain other Watch Lists.

3.2.1 Watch List Explorer – Menu Options
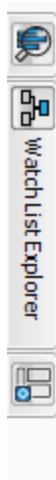
Fig.3.9

The top half of the Watch List Explorer is entitled My Watch Lists which displays Watch Lists maintained by the user. There are four icons that pertain to the Watch List Explorer, namely:

- Chart
- Data Sheet
- Delete
- Lock

Right clicking any of the Watch Lists will give you the same options, along with Rename, allowing the user to rename the Watch List from the Watch List Explorer.

The menu options for the Industry Watch Lists become available once one is selected, only Chart and Datasheet are available for Industry Watch Lists as they are maintained by Beyond Charts and cannot be edited or deleted.

3.2.2 My Watch Lists
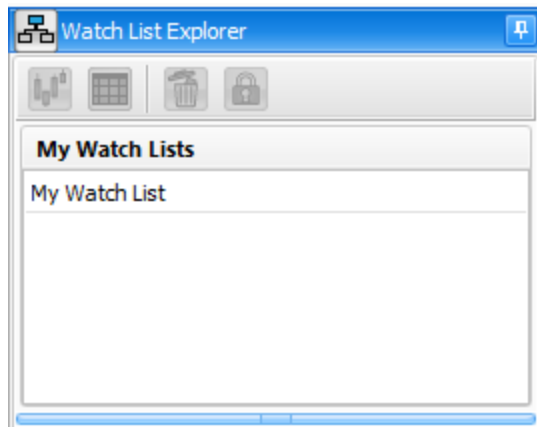
Fig.3.10

The "My Watch Lists" are those Watch Lists created by the user directly, such as through the Watch List Manager.

3.2.3 Industry Watch List

Industry Watch Lists

| All Ordinaries |
| Dow Jones Composite Average |
| Dow Jones Industrial Average |
| Dow Jones Transportation Average |
| Dow Jones US Index |
| Dow Jones Utility Average |
| NASDAQ 100 |
| NASDAQ Bank |
| NASDAQ Biotechnology |
| NASDAQ Computer |
| NASDAQ Financial 100 |
| NASDAQ Industrial |
| NASDAQ Insurance |
| NASDAQ Other Finance |
| NASDAQ Telecommunications |
| NASDAQ Transportation |
| Russell 1000 |
| Russell 2000 |

Fig.3.11

The Industry Watch Lists contain the Security constituents for each of the indices or sector indices. These are defined by external Industry groups, such as Standard & Poors. The Industry Watch Lists are maintained and updated

automatically as the change according to the index methodology used by index suppliers.

3.3 Workspace Manager
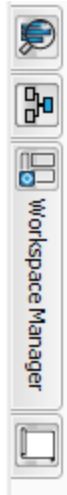
The Workspace Manager in Beyond Charts allows the user to manager their saved workspaces.

Users have the ability to create and maintain unlimited workspaces with unlimited charts and objects in each.

3.3.1 Workspace Manager– Menu Options

There are four icons that pertain to the Workspace Manager, namely:

- Apply
- Save (Save Current / Save All)
- Rename
- Delete

Right clicking any of the Watch Lists will give you the same options, except Save.

3.4 Formula Explorer

The 'Formula Explorer' lists all the formulas and systems that are available. As a start, we have included a number of Long Entry and Long Exit formulas along with Systems as Samples. Using the example formulas / systems is a great way to start using the tools without actually understanding the formula language.

For a detailed explanation on how to use BCFL and the Formula Editor please refer to the BCFL Reference Manual.

3 PANELS

Formula Explorer

Group △

Formula Name

⊞

▬ Sample Formula

MACD Crossover Long Entry
MACD Crossover Long Exit
MACD n MA Longer Term Long Entry
MACD n MA Longer Term Long Exit
MACD Zero Crossing Long Entry
MACD Zero Crossing Long Exit
Moving Average Crossover Long Entry
Moving Average Crossover Long Exit
New High Long Entry
New High Long Exit
Percentage Rise in Price Long Entry
Percentage Rise in Price Long Exit
Price n Volume Spike Long Entry
Price n Volume Spike Long Exit
Stock priced in a range Long Entry
Stock priced in a range Long Exit
Triple MA Long Entry
Triple MA Long Exit

⊞ **Sample System**

© Copyright Quantum Methodologies

The 'Formula Explorer' is also where all your formulas and systems are saved. Whenever you create a new Formula or System within the 'Formula Editor' and save it, it will be added and saved to the 'Formula Explorer'.
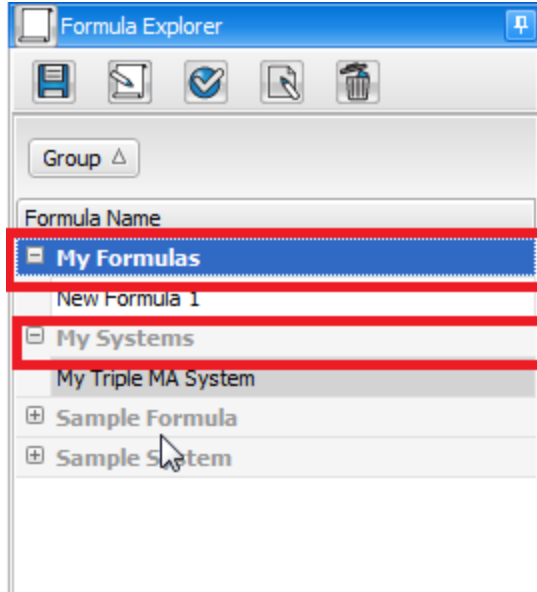
3.5 Indicators

Key Words: Technical Indicators, Trading system.

The Indicators Panel option is enabled only when a Chart is open for viewing. Technical indicators are primarily used to analyse price movement in a security. All indicators aim to provide an indication of the current direction and momentum of a security in relation to past price action. The period over which an indicator compares price action can be varied to match the market or to match the requirements of a trading system.

Each indicator has advantages and disadvantages that must be considered. By combining several indicators the weaknesses of one may be compensated for by the strengths of the others.

A single technical indicator or a collection of indicators does not constitute a trading system. Only when exact criteria for entering and exiting a trade are defined using the indicators does a trading system exist. The trading system is then combined with risk management and money management to create a trading methodology.

Beyond Charts provides most of the popular technical indicators. The list will be expanded over time as the need arises. The Indicators are divided into 14 Groups and Fig.3.12 shows the list of Indicators implemented in Beyond Charts:

Group	Items
Bands	Bollinger Bands
	Fractal Chaos Bands
	High Low Bands
	Moving Average Envelopes (xMA)
	Prime Number Bands
Index	Trade Volume Index

3 PANELS

Momentum	Aroon Oscillator
	Chaikin Money Flow
	Chande Momentum Oscillator
	Fractal Chaos Oscillator
	MACD
	MACD Histogram
	Momentum Oscillator
	Prime Number Oscillator
	Rate of Change
	Stochastic Oscillator (Full)
	TRIX
	Ultimate Oscillator
	Williams %R
OB/OS	William Accumulation Distribution
OBV	Price Volume Trend
Other	Swing Chart
	Swing Index

Smoothing	Chande VIDYA
	De-trended Price Oscillator
	Exponential Moving Average
	Median Price
	Price Oscillator
	Simple Moving Average
	Time Series Moving Average
	Triangular Moving Average
	Typical Price
	Variable Moving Average
	Weighted Moving Average
	Welles Wilder Smoothing
Strength	Accumulative Swing Index
	Average Directional Index
	Mass Index
	Performance Index
	Relative Strength Comparison
	Relative Strength Index
TBD	Linear Regression Forecast
	Linear Regression Intercept
	Linear Regression R-Squared
	Linear Regression Slope
Trading Bands	Parabolic SAR
	Percentage Trailing Stop
Vol Strength	Ease of Movement

Volatility	Average True Range (xMA)
	Average True Range Volatility
	Chaikin Volatility
	High Minus Low
	Standard Deviation
	True Range
	Vertical Horizontal Filter
	Volatility Stop
Volume	Money Flow
	Negative Volume Index
	On Balance Volume
	Positive Volume Index
	Volume
	Volume Oscillator
	Volume Rate of Change

Fig.3.12

3.5.1 Indicators – Menu Options
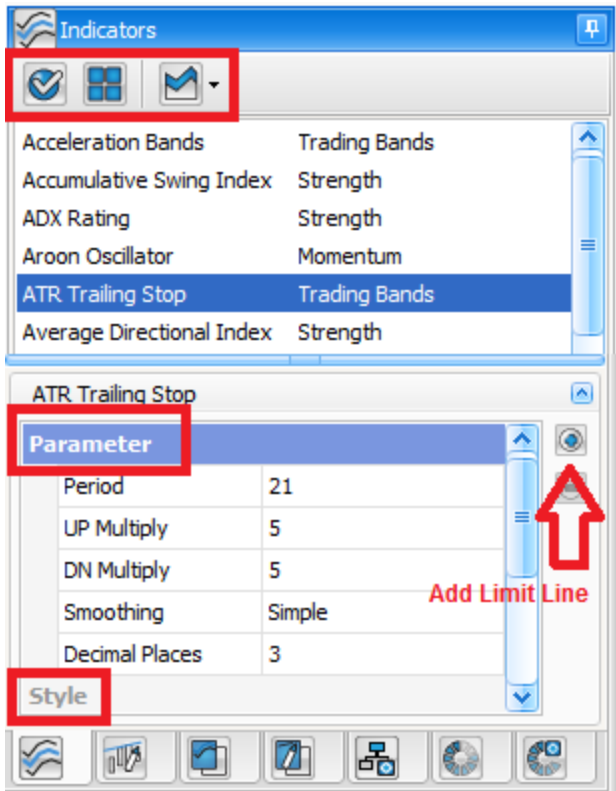
Fig.3.13

The Indicators list can be sorted from A-Z or Grouped using the menu button. When you click on an Indicator, the associated parameters and visual settings will appear in a section at the bottom of the panel. This allows the user to alter the Indicator before applying it. Fig.3.13 highlights the option.

If the indicator is set on Group Mode and if the list is not expanded, double clicking on the Group Name with the gray background in the Indicator Panel will

expand the whole list. The other method to show the Group Menu is to click on the A-Z Menu and then change it back again to Group Menu.

3.6 Line Studies

3 PANELS

Line Studies

Advanced
- Speed Resistance Lines
- Andrews Pitchfork

Fibonacci
- Arcs
- Fans
- Retracement/Projection

General
- Trend Line
- Ellipse
- Rectangle
- Profit/Loss Line
- Vertical Line
- Horizontal Line
- Annotation
- Stamp
- Annotation
- Stamp

Level
- Quadrant Lines
- Tirone

Annotation

Parameter	
Position	Locked
Border	Off
Style	
Color	0, 192, 0
Size	8
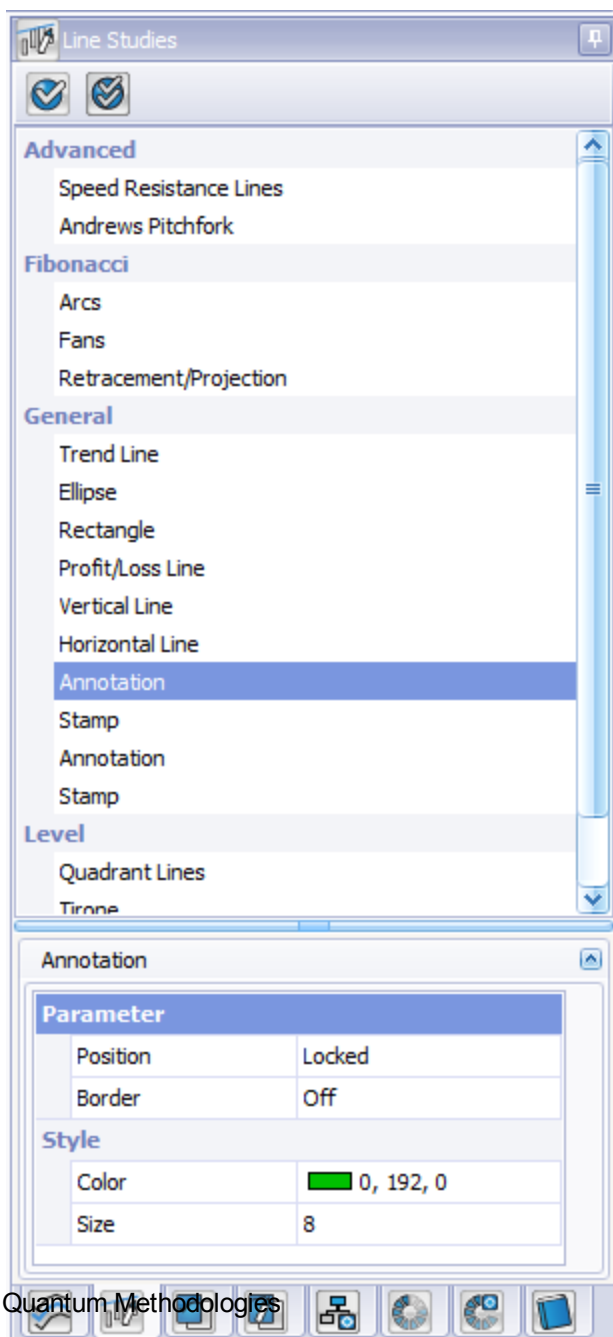
Fig.3.14

The Line Studies panel contains a number of tools for studying price patterns in charts. They are typically used for advanced technical analysis. The Line Studies section is only enabled when a Chart is open for viewing.

Notice that when you click on a Line Study, the associated parameters and visual settings will appear in a section at the bottom of the panel. This similarly allows you to modify the parameters for the Line Study before you apply it to a chart. Fig.3.15 provides the whole list of the Line Studies implemented in Beyond Charts that are segregated into 4 different Groups: Advanced, Fibonacci, General and Level.

If the Line Studies shown in Fig.3.14 cannot be seen, double click on the Group Name with the grey background in the Line Studies Panel to expand the list.

Group	Items
Advanced	Andrews Pitchfork
	Speed Resistance Lines
Fibonacci	Arcs
	Fans
	Retracement/Projection
General	Trend Line
	Ellipse
	Rectangle
	Profit/ Loss Line
	Vertical Line
	Horizontal Line
	Annotation
	Stamp
Level	Quadrant Lines
	Tirone

Fig.3.15

3.6.1 Applying a Line Study to a chart
To apply any of the Line Studies to a chart, users can use one of four methods:

Apply button
By highlighting the desired Line study, simply click the Apply icon at the top of the panel then draw your line study onto the chart.

Right click > Apply
By right clicking on the desired Line Study, simply click the Apply option then draw the line studay onto the chart.

Double Click
By double clicking any of the Line Studies, will allow you to draw it onto the chart.

Drag and Drop
By dragging the desired Line Study from the panel onto the chart, will change the mouse cursor allowing you to draw the chosen Line Study.

3.6.2 Multi Draw Mode
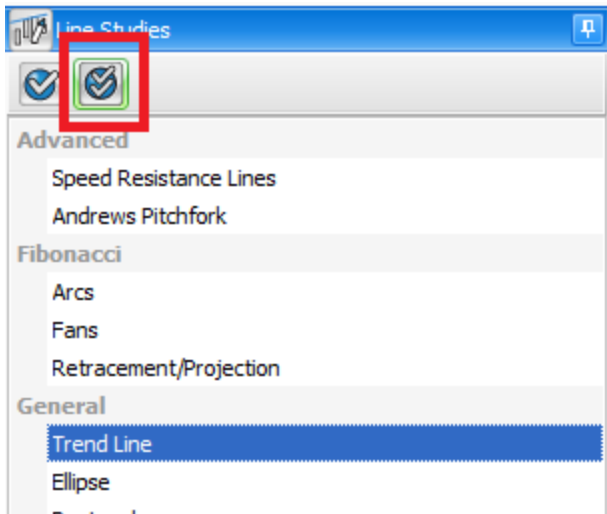
Multi Draw Mode when enabled, allows the user to draw an unlimited number of Line Studies onto a chart, without the need to apply the same line study numerous times.

When enabled, the button is highlighted as shown above, and whichever Line Study the user has selected to apply (whichever the method they choose to apply) they can continue to draw as many of those line studies onto the chart until they either turn the Multi Draw Mode off, or press the ESC key on their keyboard.

3.6.3 Modifying a Line Study

The parameters of each line study can be modified either before applying via the Line studies parameters window at the bottom of the Line Studies panel, or via right clicking the line study once applied to the chart and selecting MODIFY as shown below.
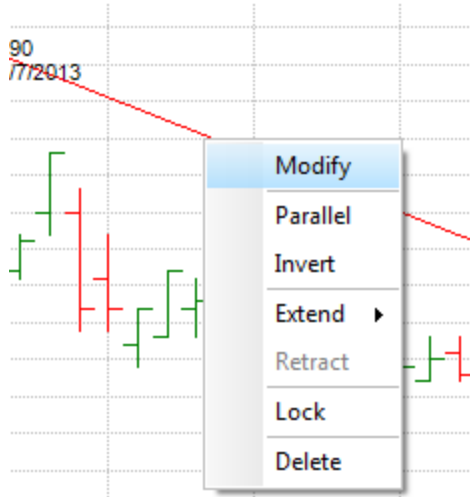
Parameters such as colour, width, transparency, size, stamp, position, border and levels can all be modified via these methods, depending on the line study selected.

Text on Annotations may be modified by double clicking it or by right clicking and selecting Edit. Clicking out of the Annotation textbox or pressing ESC will exit edit mode.

3.7 Overlays

The Overlays panel is only enabled when a Chart is open for viewing.

An Overlay allows the user to save a favourite chart layout to a template that can be quickly retrieved at any time and the same overlay reapplied to another chart. A number of Overlays with a common theme can be saved into an Overlay Group.

The Overlay saves:

- Multiple indicators, including defined parameters

- Type of chart, such as Bar, Candle, Line etc.

- Time scale: Day, Week or Month

An Overlay Group contains a set of ten (10) Overlays that usually have a common theme.

Overlays provide a powerful and productive functionality that can save a huge amount of time to conduct technical analysis. Set up all your favourite indicators so that you can recall them with a single click or keyboard command.
To select an overlay, either press the FKey, F2 to F11, on the keyboard or double click the FKey in the Overlay panel.
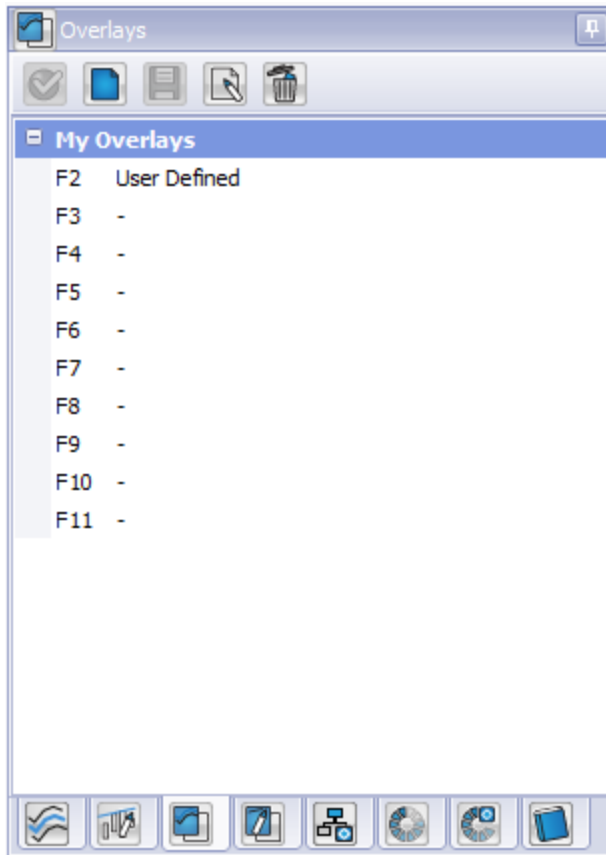
Fig.3.16

3.7.1 Overlays – Menu Options

Fig.3.17

The Overlay menu is accessible using the menu displayed on the top of the panel or right clicking the relevant FKey, F2 to F11.

Apply is a third option of applying an Overlay, and will apply the highlighted overlay key from the panel.

New allows the user to create an entirely new Overlay group with another 10 FKeys available for setup, and Rename not only allows the user to rename any overlay groups they have setup, but also rename individual Overlay keys as well.

Save is used to store the desired chart layout to a selected Overlay key, so once a user has applied their required indicators and set up the chart in the preferred way, they simply highlight the FKey they wish to save the layout to, and selecting Save from the panel menu at the top or on the right click menu for that key.

Clear will erase the layout associated with the highlighted FKey, resetting it back to blank.

3.8 Analyses Manager
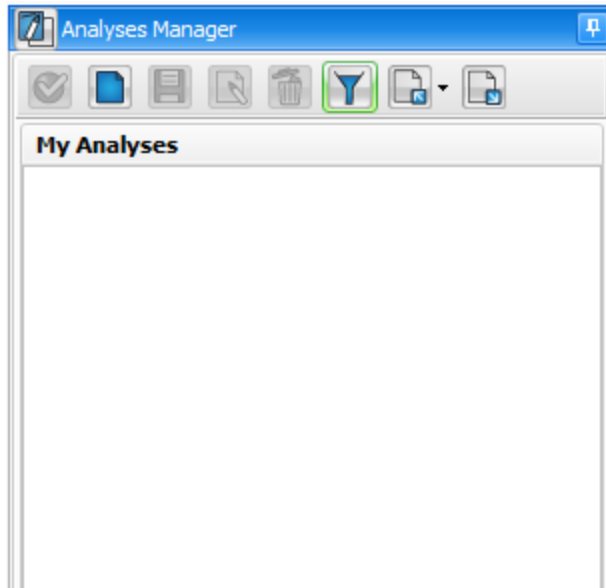
Fig.3.18

The Analyses Manager is used to save a template of applied Indicators and Line Studies, with set parameters that can be applied to a chart of one particular Security.

Overlays are different from saved Analyses. Saved Analyses pertain to a single security, whereas an Overlay can be applied to any security.

If the security has no associated analyses, and the [Filter] is selected, the panel will be empty as shown in Fig.3.18 .

3.8.1 Analyses Manager – Menu Options
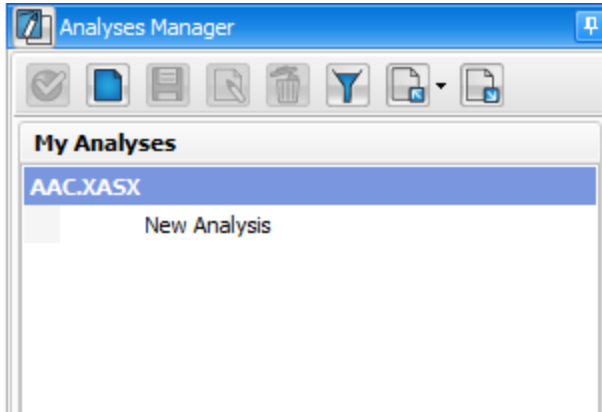
Fig.3.19

To display all the analyses for all securities, turn the [Filter] off in the panel menu. The analyses will be grouped by the security code.

The user may create as many analyses for a security and each analysis may contain an unlimited number of indicators and Line Studies with preselected parameters and a customised chart appearance.

Similar to setting up an Overlay, a user can save their desired analysis once it is has been applied to the chart. Once the preferred indicators and/or line studies are applied to the chart, simply click the New button at the top of the Analyses Manager and a New analysis is created as shown in Fig.3.19 . Alternatively if preferred, applied analysis can be automatically saved as a new analysis by pressing the CTRL + S keyboard combination.

The user can then Apply, Save over, Rename or Delete any saved analysis via the panel menu or right click menu.

The user can create multiple saved Analyses per stock / instrument. To select one as the default to be automatically displayed whenever the stock's chart is

opened, right click on that saved Analyses and select "Set as Default". The default Analyses will be ticked.

Then with "Auto Load, Analyses" selected on the CHART tab, the default saved Analyses will automatically be displayed.
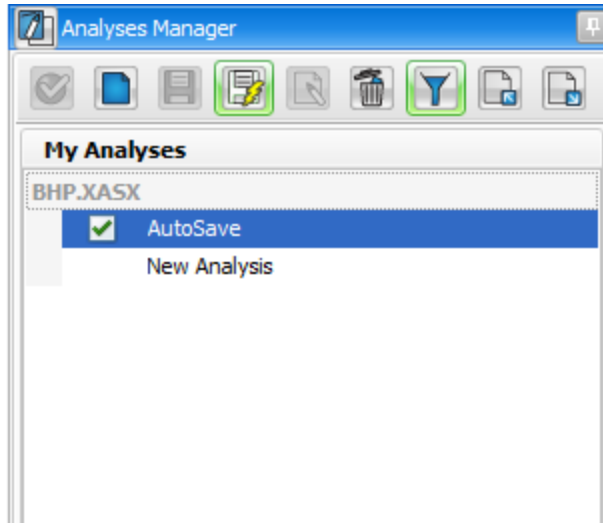
The user may also elect to automatically save any indicators or line studies as their default analysis, if no other analysis is already set to default, without having to manually save each time by turning on 'AutoSave Analysis'. This will update an analysis called AutoSave each time they change, remove or apply an indicator or line studies to the chart.

For example, if a user applies a volume indicator to BHP with no existing analysis and AutoSave Analyses enabled, it will create a new default Analyses called AutoSave:

3 PANELS

3 PANELS

AutoSave will not automatically overwrite selected defaults. If a line study is applied to a blank chart with an existing, unapplied default, a new AutoSave will be created without overriding settings.
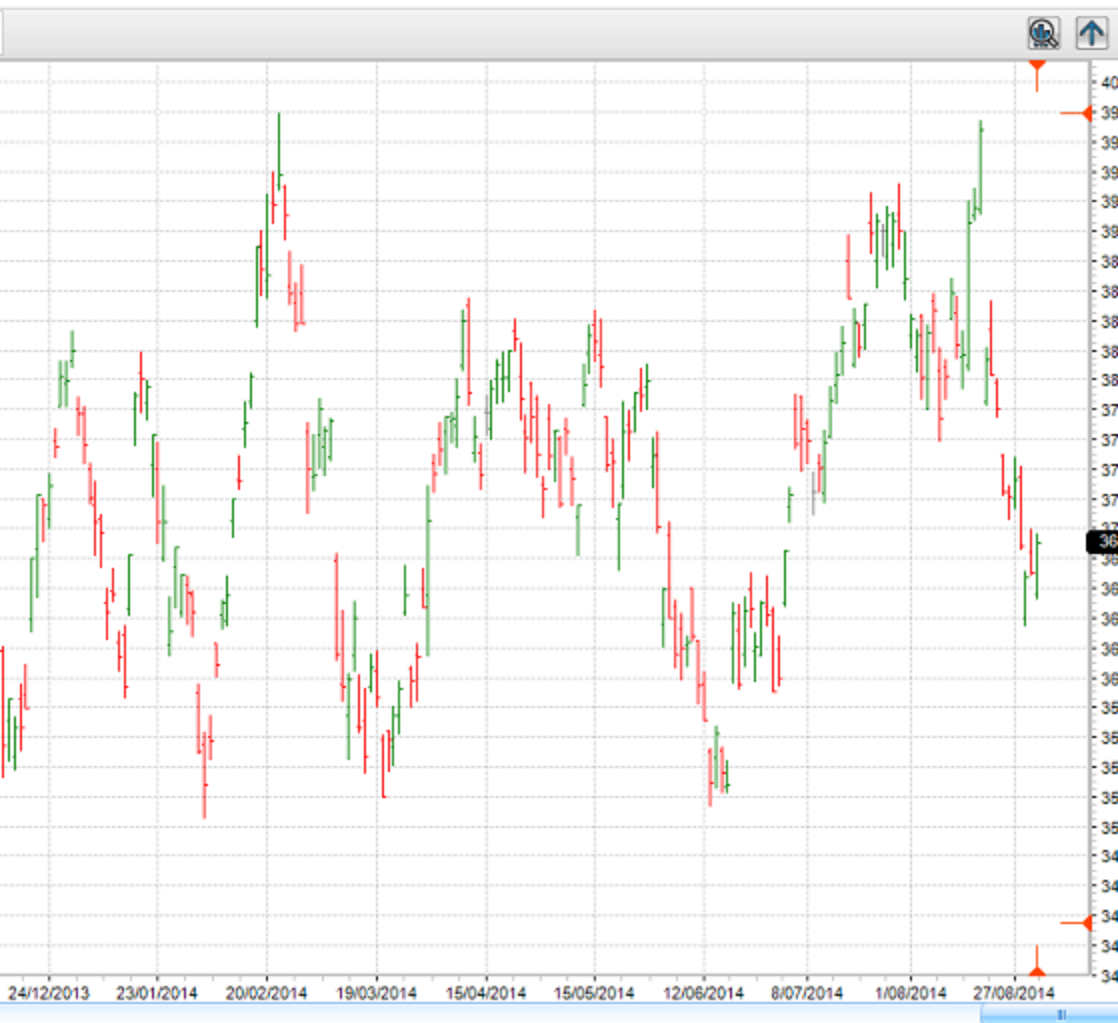
3 PANELS
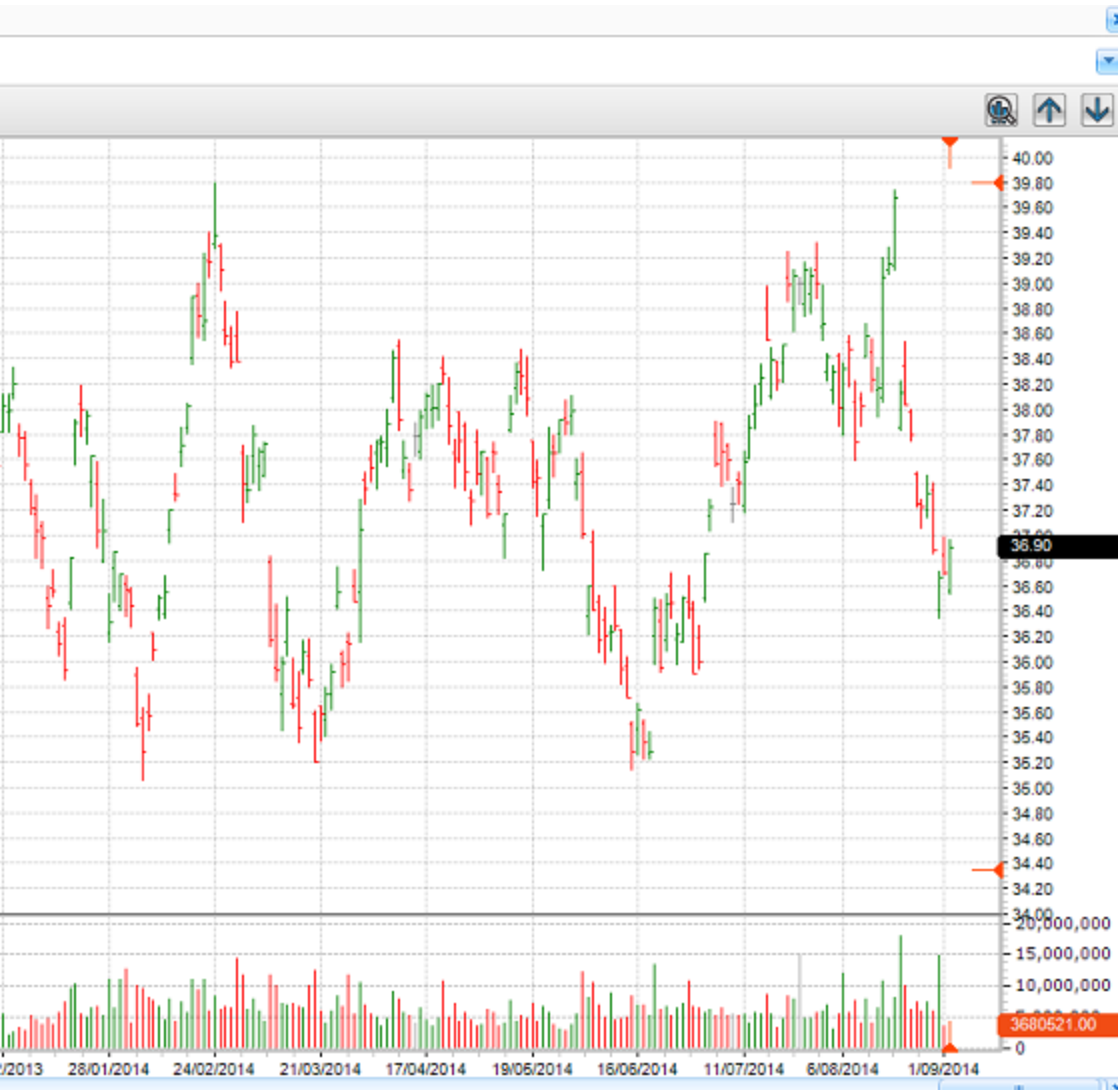
Custom Analyses that are manually applied to the chart (not the automatically generated AutoSave analysis) which are modified will all keep changes when

AutoSave is enabled. These changes do not affect the specific AutoSave analysis, only the manually applied analyses, when the program or chart is closed.

Similarly, when a user selects a different default analysis ('My Analysis') to be automatically loaded after AutoSave has been created, it will continue to modify the chosen default 'My Analysis' unless the AutoSave analysis is manually applied.

3.9 Watch List Manager

Beyond Charts supports the use of Watch Lists. A Watch List is a combination of Securities (Stocks, Indices, Commodities, and Sectors) that can be grouped together for analysis, research or any other purpose.

The Watch List Manager panel is the main tool for creating and maintaining a Watch List. The Watch List can be created from:

- Individual Securities,

- A GICS/ICB classification/Exchange/Instrument combination, and

- Other Watch Lists.

When a Watch List is created, it will be displayed in the Watch List Explorer. Having a Watch List allows users to easily analyse all securities in the list. A Watch List can be added or combined with another Watch List.

Each Watch List can be maintained (add and delete codes) via the Watch List Manager or through a Data Sheet. Fig.3.20 shows an example of the Watch List Manager Panel.
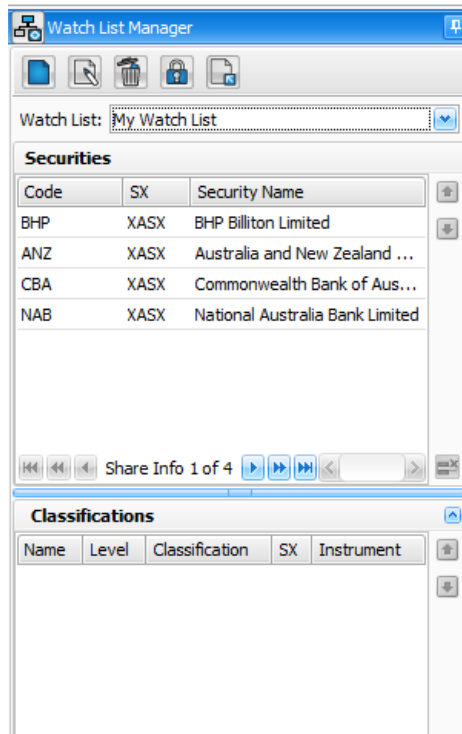
Fig.3.20

3.9.1 Watch List – Dropdown Menu

All existing Watch Lists can be accessed using the dropdown menu "Watch List:". When a Watch List is selected, the Securities box will display all the security names in that Watch List. The securities can be added or deleted from the list and can be moved up and down the list using the up and down arrows alongside the securities box.

3.9.2 Watch List Manager – Import Watch List

Users can import external lists of securities and create a Watch List in Beyond Charts using the [Import] button within the Watch List Manager.

The source file must be in csv format, and can either have just the Code listed for single exchange imports, or have the Code, Instrument, Exchange listed in that order (column A, B, C). Having this extra information listed will allow you to import a mixture of exchanges and instruments if desired.

To import an external list of securities, click the Import button at the top of the Watch List Manager. Specify the local Import File and then specify the Watch List Name. If the Watch List Name already exists, you have the option to Append Data (add to existing Watch List) or Overwrite Data (replace existing Watch List). If it doesn't exist, these options will be disabled and a new Watch List will be created. If the source file is a single exchange list with just a list of codes, users must specify the Instrument and Exchange (default Stocks and XASX) under the Global Settings as shown in Fig.3.21 before clicking OK. If the source file contains this information, it will ignore the Global Settings when importing.
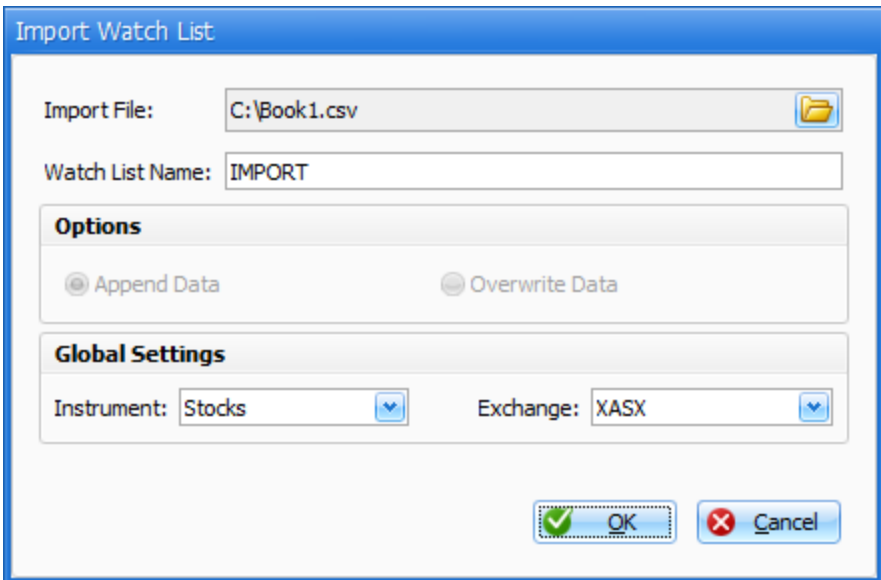
Fig.3.21

If there are unrecognised securities, due to either incorrect exchange or code when importing, the user will be shown the items unable to be imported as shown in Fig.3.22 and given the option to Accept or Discard. Choosing Accept will create the Watch List without the items listed as unable to be imported, whereas Discard will not import anything and take the user back to the Import Watch List screen to allow them to fix the source file where needed or change the Global Settings and try re-importing.
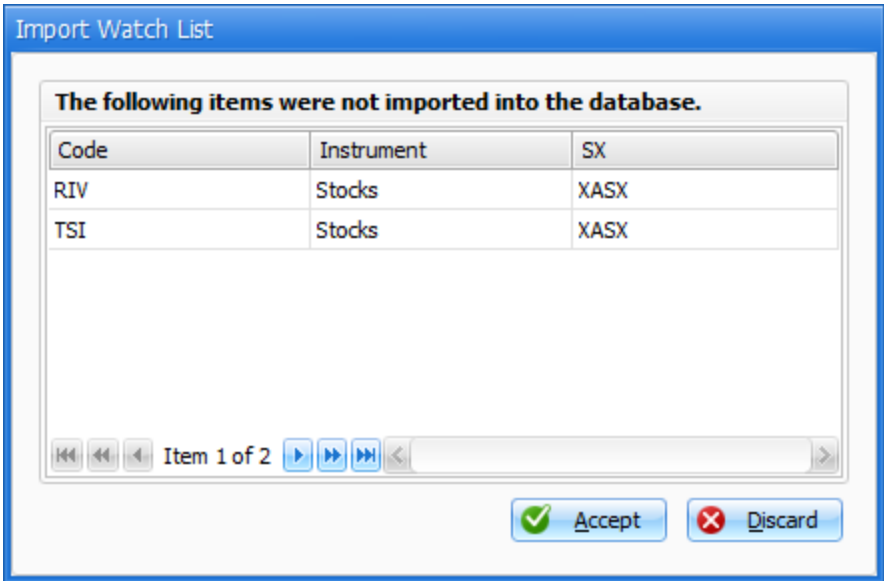
Fig.3.22

Once successful, Beyond Charts will display an Import Success message in the bottom right of the screen as shown in Fig.3.23 .

3 PANELS
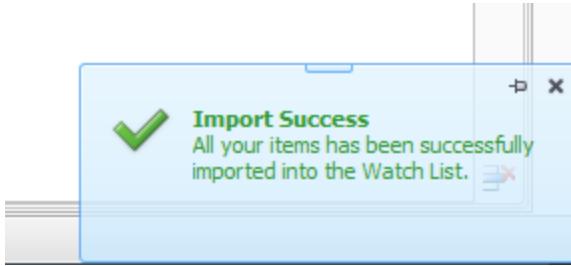
Fig.3.23

3.10 Scans
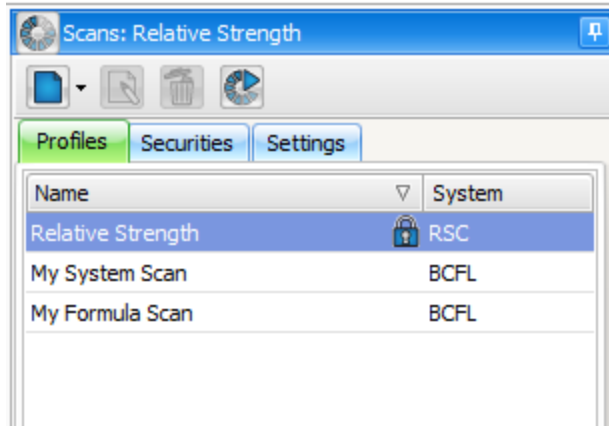
Fig.3.24

This displays all the Scan Profiles. There are three tabs available in the Scan Panel: Profiles, Securities and Settings. The Securities and Settings tab are associated with the Profiles tab. The Start Scan menu button at the top right corner in the Scans panel will only be enabled when the profile selected actually has all the necessary fields filled. An explanation of the functionality for each tab is provided below:

3.10.1 Profiles – Tab

To set a new scan profile, click on New at the top of the Scans panel, select the System for the new scan profile, give it a name (Example: My Scan) and select OK. Once a profile has been created, it will be displayed in the Scan Profile column. Notice that there are 2 columns shown in the Profiles tab, Name and System. The System column will reflect the selection chosen when creating the new profile.

Only these types of "System" are currently supported:

System:

- RSC

- BCFL

3.10.2 Securities – Tab

The Securities Tab displays three sections labelled Securities, Classification and Watch Lists. If the desired stock grouping, sectors or classifications do not already appear in at least one of the three windows, then open the Securities Explorer slide out panel and select which Sector Classification(s) you wish to scan with your Custom Profile). Simply 'drag & drop' your selections anywhere over the Scan slide-out panel. It will automatically locate to the correct window as shown in Fig.3.25 .

The Classifications window will then display the selection with column headers: Name, Level, Classification, Exchange and Instruments. The Exchange and Instruments can be modified to the following options listed:

Exchange:

- Cash & Forward
- Forex Spot
- Future Continuous
- USA Other
- World Indices
- XASX
- XJSE
- ARCX
- XNAS
- XNYS

Instruments:

- -
- Delisted
- ETO
- Indices
- Stocks
- Warrants

Fig.3.25

3.10.3 RSC Scan

The Relative Strength Comparison (RSC) Scan in Beyond Charts allows a user to scan securities to list those outperforming a specific Market, Sector or other securities of the user's choosing.

In order to run an RSC scan, the user must first setup a new RSC Scan profile, and then specify the items they wish to scan, along with the RSC Parameters (settings) they wish to use for the scan.

To setup a new RSC Scan profile, click NEW, RSC in the Scans panel as shown in Fig.3.26 .
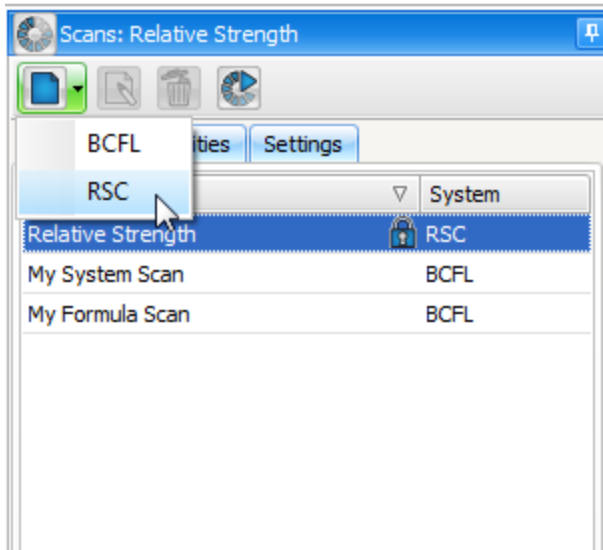
Fig.3.26

After giving the RSC Scan profile a name, click OK and it will appear in the Profiles list. Secondly, to add the items to the scan that the user wishes to scan, ensure that the Scan profile is highlighted and click the Securities tab. For a newly created scan, the 3 boxes will be empty and at least one needs to be filled for the scan to run. Drag and drop either a Watch List from the Watch List Explorer on the left hand side panel or individual Securities or Classifications from the Securities Explorer as shown in Fig.3.27 .
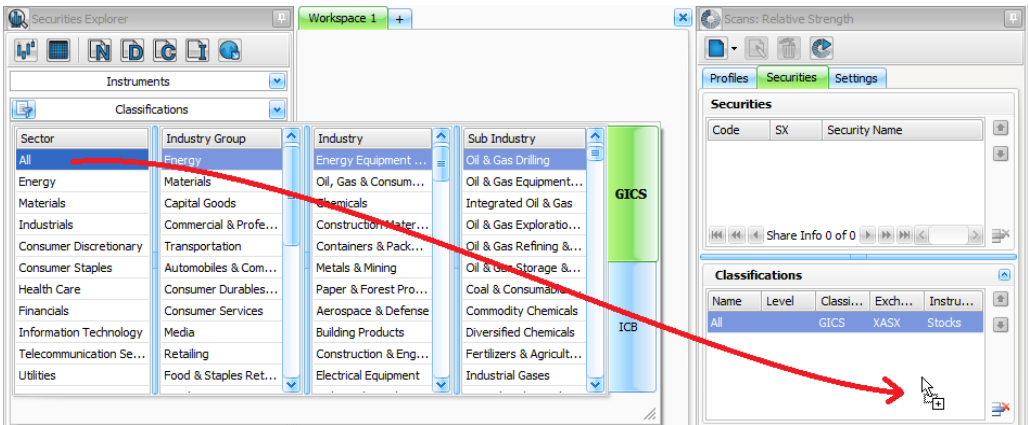
Fig.3.27

Once the scan has items defined, it also needs a Parameter profile (settings) associated with it. If there is already an RSC Parameter profile setup, it just needs to be selected from the Parameters drop down menu in the Settings tab as shown in Fig.3.28 .
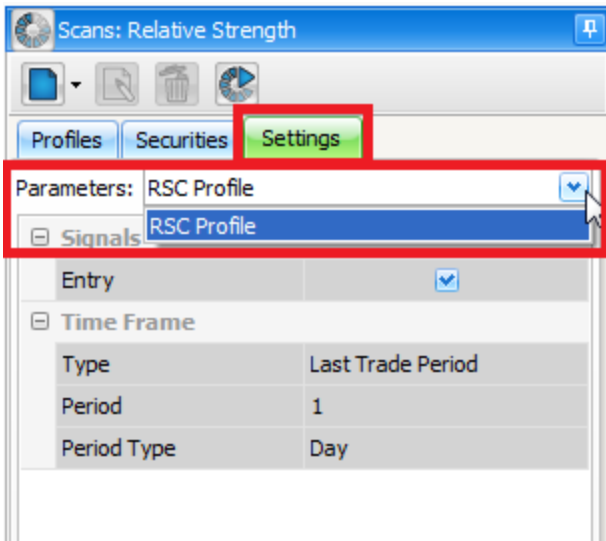
Fig.3.28

To create a new RSC Parameter profile click the New, RSC option in the Parameters panel as shown in Fig.3.29
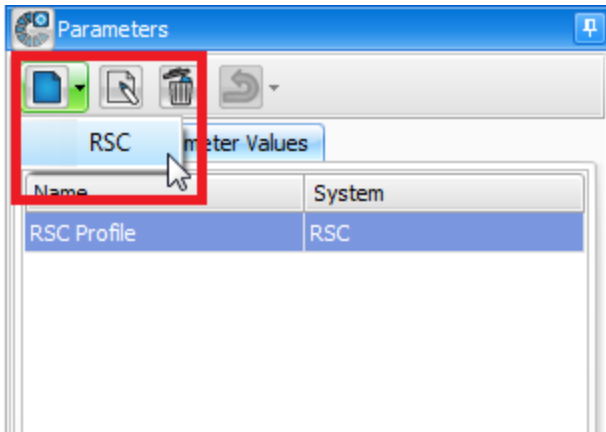
Fig.3.29

After naming the Parameter profile, the settings can be reviewed and modified, if needed, in the Parameter Values tab, shown in Fig.3.30 where user preferred Moving Average types and periods can be set, along with an individual security or AUTO comparison (either Market or Sector) as well as scan time frame, which can be set for x days, weeks or months.
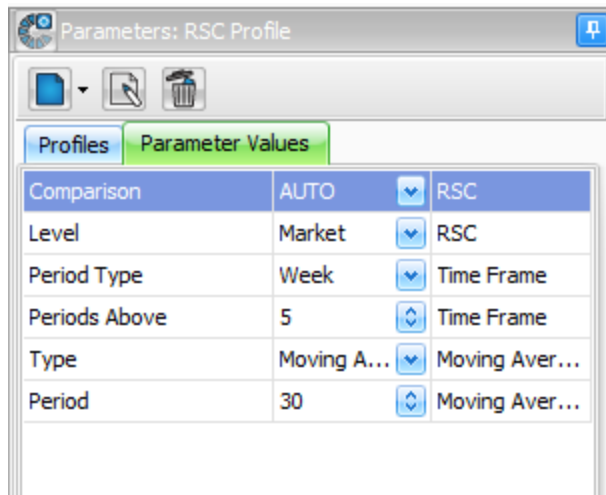
Fig.3.30

Once setup, the newly created RSC Parameter profile can be associated with the RSC Scan profile as described above.

As with other scans (BCFL), users can start scanning via the Scans panel Start Scan button or select their desired scan from the Systems menu in the Beyond Charts ribbon.

3.10.4 Beyond Charts Formula Language (BCFL) Scans

The first step to running a 'BCFL scan' is to set up your formula or system in the [Scan Profile] panel which is located in the right hand menu. Once the 'Scan Profile' panel is opened, pin the panel for use.
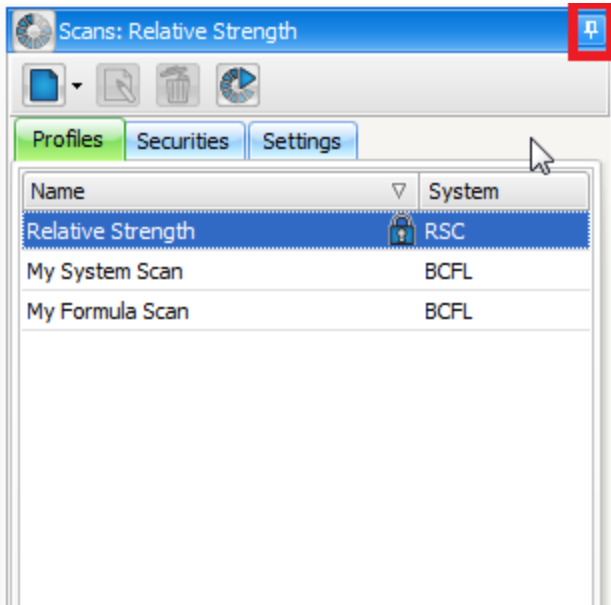
In order to run an BCFL scan, the user must first setup a new BCFL Scan profile, and then specify the items they wish to scan, along with specifying the Formula/System and settings they wish to use for the scan.

Quick Reference allows you to quickly view tips and instructions on how to use BCFL functions. It gives you the definition of the function, its syntax, an example, its parameters and useful links for further reading.
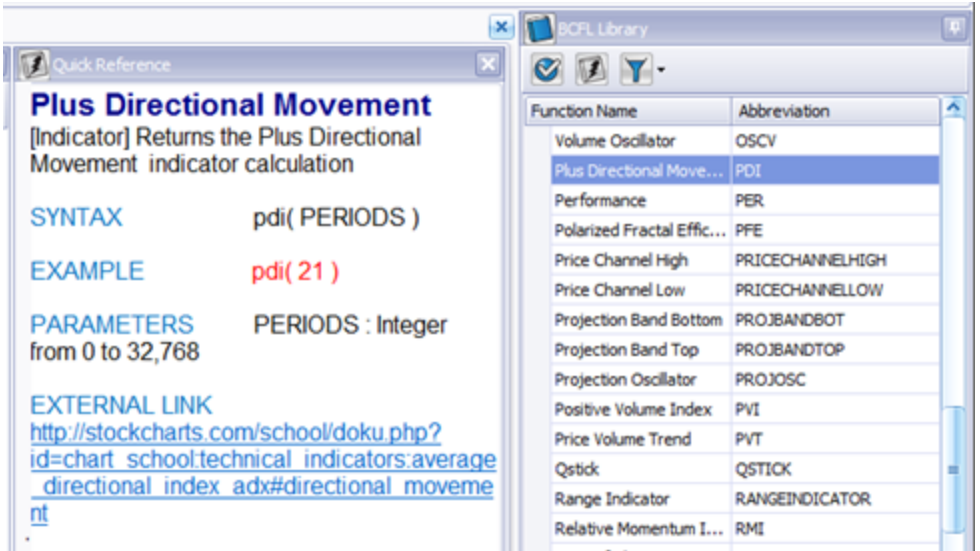
The Quick Reference button is found on the panel menu of the BCFL Library Panel. Upon clicking the button, the Quick Reference will open as a window within the current workspace.

New Scan

To setup a new BCFL Scan profile, click NEW, BCFL in the Scans panel as shown in Fig.3.26 .
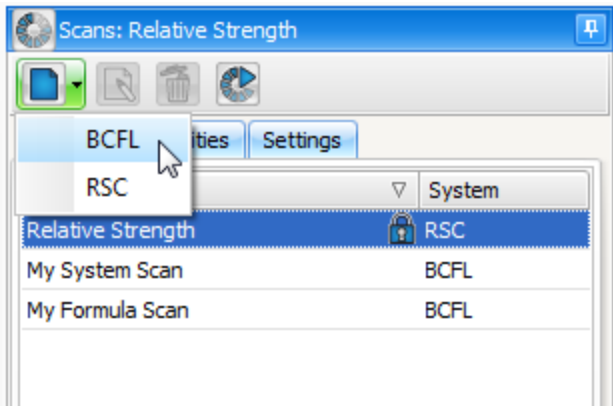
Fig.3.31

Profiles

After giving the BCFL Scan profile a name, click OK and it will appear in the Profiles list.

Securities

Secondly, to add the items to the scan that the user wishes to scan, ensure that the Scan profile is highlighted and click the Securities tab. For a newly created scan, the 3 boxes will be empty and at least one needs to be filled for the scan to run.

You can add individual securities by searching for the security name in the 'Securities Explorer', in this case BHP and once highlighted, left click and drop 'n' drag the security into the Scan Profile panel. You can add as many securities as you wish.
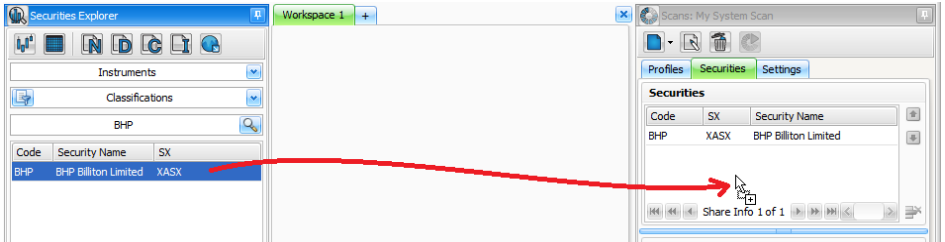
You may wish to add one or more watch lists to your 'scan'. Highlight the watch list in the [Watch List Explorer] and then drop n drag it into the 'Scan Profile' panel.
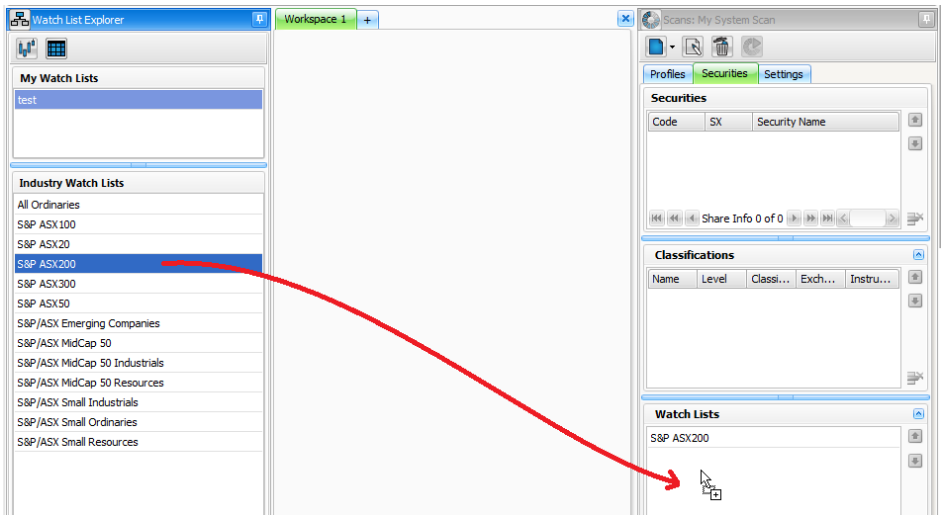
Alternatively, you may prefer to scan securities in an industry group or sector or even scan the entire market. You have the ability to enter categories of securities from the 'Classifications' tab located in the 'Securities Explorer' and you can add them to the 'Scan Profile' panel by dropping n dragging.
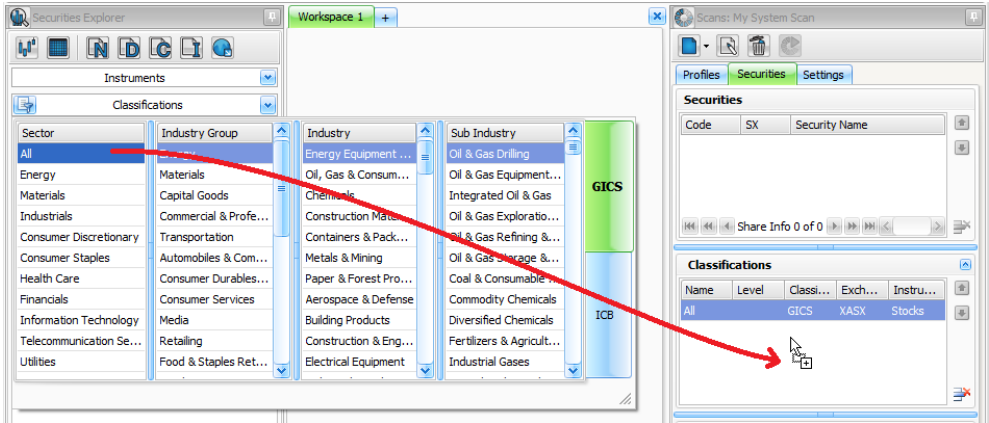
Once you have dropped n dragged items into the Scan Profile panel, you will visually be able to see the break up of Securities, Classifications and Watch Lists you have added to your 'Scan Profile'.

Settings

The 'Settings' tab allows you to define your scan settings.

Click the down arrow beside 'Formula' and you now have access to your saved BCFL Formulas and Systems within the Formula Explorer.

Select a BCFL Formula or System from the drop down list to add it to the 'Scan Profile'.

BCFL Formula

If a BCFL Formula is selected, the only remaining component to complete your 'Scan Profile' is the 'Time Frame'.

BCFL system

If a BCFL System is selected, an area called 'Signals' defines how the system will run. Although the Long Entry, Long Exit, Short Entry and Short Exit are selected within the Signals, the scan will ONLY run across the formulas you

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have defined as part of your system. Eg; if you have previously created a Long Entry and Long Exit Formula, the Scan will ONLY run the Long Entry and Long Exit even though the Short Entry and Short Exit tick boxes are ticked.

However, if you have created a Long Entry and Long Exit system but only wish to run a scan for Long Entries, you can un-tick the Long Exit.

Time Frame

Lastly, set the Time Frame for the Scan from the Settings tab. The typical settings should be Type = Last Trade Period, Period = 1 (or a few), Period Type = Day (unless weekly data needs to be scanned).

Avoid using Type = All available data for BCFL Scans when scanning as you typically need to know whether an alert has occurred over the recent past. For further historical testing, use Back Test from within the BCFL Formula Editor.

Click [Start Scan] and the Scan Results window will pop open. Each security that meets the Formula's conditions will be listed in the Scan Results window. These results can be saved to a Watch List or even exported to Excel.

Once the scan is complete, double click on any of the listed securities and a chart window will pop open. Use an Overlay containing the saved indicators used in the script to overlay the script indictors on the chart.

As with other scans (RSC), users can start scanning via the Scans panel Start Scan button or select their desired scan from the Systems menu in the Beyond Charts ribbon.

3.11 Parameters
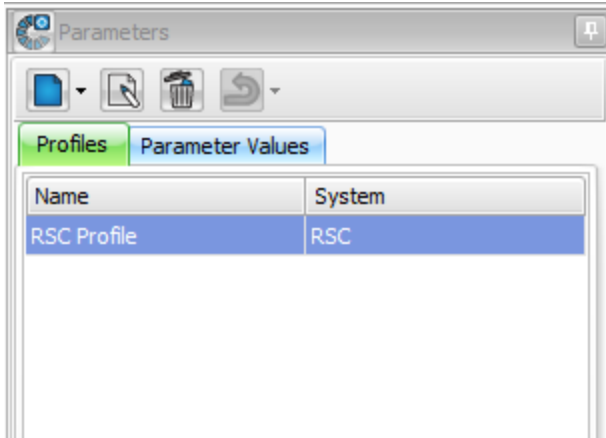
Fig.3.32

The Parameters panel in Beyond Charts is contains the Profiles and Parameter Values tabs.

3.11.1 Profiles – Tab

Beyond Charts is preloaded with a Default Profile settings as shown in Figure 3.38 which contains the default RSC profile 1.

The Parameters for the profile may be modified according to your needs in the Parameter Values tab.

3.11.2 Parameter Values – Tab

The Parameter Values displayed will depend on the System associated with the Profile that is selected.

3.11.2.1 RSC
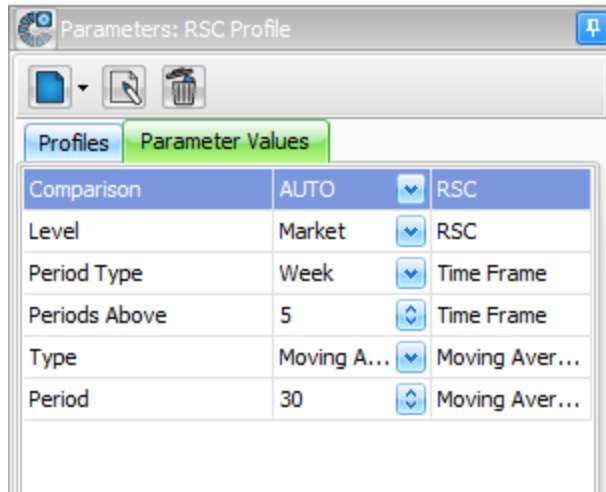
Fig.3.33

The Parameter Values for RSC are grouped in the following format as shown in Fig.3.33 :

- Moving Average
- RSC
- Time Frame

3.12 BCFL Library

The 'BCFL Library' contains the entire functions of the formula language. The 'BCFL Library' is either preloaded with the Easy Start environment or you can open the 'BCFL Library' panel from the right hand side menu.

The 'BCFL Library' includes the indicators, mathematical operators, look-up and reference operators and a number of other types that make up the formula language.

The BCFL Library shortens the time it takes to get up and running and it removes the issue of having to look-up complex documentation and understand how to write formulas. For example, if you would like to create a Moving Average, you can select the Moving Average from the BCFL Library and either select the [Apply] icon or drag 'n' drop the formula into the 'Formula Editor'. So you can start using the formula language before understanding the actual code.

Once you complete either of these two actions, the formula will immediately appear within the Formula Editor with the default values for that function.

4

WINDOWS

The following topics are covered in this chapter:

- Chart
- Data Sheet

4.1 Chart

A Chart Window displays the price history and any applied indicators or line studies for a selected Security.

The OHLCV data is displayed on the status bar of the Chart as shown on . Users are required to hover the mouse over the chart and point the cursor to the required bar to display the OHLCV data for that selected date.

Workspace 1 - Beyond Charts

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Tools

From an open chart window, the user can use the Pg Dn and Pg Up keyboard keys to move down and up a chart at a time. If a single chart is opened from the Securities Explorer, the next displayed chart will be the next in the Beyond Charts database. However, if the opened chart is in a Watch List, only charts within that Watch List will be displayed in the order in which the Watch List was saved.

Instead of the Pg Up and Pg Dn keys on the keyboard the Up and Down arrows at the top right corner of the chart window, as can be seen in Fig 4.1, can also be used to step up and down through a Watch List or any chart list.

The status bar at the bottom of the chart will also display if any Overlay is applied to the chart at the time. As shown in to the right of the OHLCV figures, the overlay notification depicted by the yellow and grey square icon shows what Overlay group and key are applied to the chart.

Multiple charts and/or Watch Lists can be opened from the Securities Explorer and Watch List Explorer, with parent objects, (charts and data sheets) being tabbed to avoid the workspace being compressed with charts and data sheets being opened side by side.
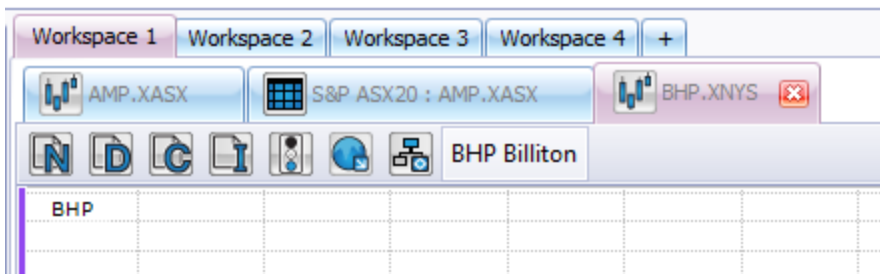
Fig.4.1

Child objects, such as Dividends, Share Information, Notes and Signals are opened to the right of Parent windows, and can be moved and re-positioned as covered in section 1.2.2 - General Terms > Windows > Window Size and Position.

4.1.1 Decimal place precision

Fig.4.2

The Precision or decimal places of the chart can be modified to the users need, by simply rightl clicking on the chart and selecting MODIFY. Users can then set their desired number of decimal places for the charts, and therefore lines studies to inherit.

4.1.2 Chart Scaling

Some line studies display information outside the default scaling of the chart. The best example is the Fibonacci Projection lines that can place forecast levels above the current price outside the default scale.

Using the red scaling handles on the right at the top and bottom of the chart, allows the user to adjust the price scaling allowing prices above or below the default scaling to be shown.

Workspace 1 - Beyond Charts

Version
Check

Help

Tutor
Me

Tools

4.1.3 Chart Scrolling

The scroll bar at the bottom of the chart window allows the user to browse throught the history of the chart easily.

Users can also scroll the chart using the arrow keys on their keyboard. Using the left and right arrows will scroll the chart forwards or backwards 1 bar at a time, holding shift whilst using the left and right arrows will scroll the charts forwards or backwards 1 week (5 bars) at a time.

Chart scrolling is also achieved by using their mouse wheel. When you first use your mouse wheel, users will be asked for their preference with using the mouse wheel to scroll or while also holding down control (CTRL) on your keyboard (the alternative choice will change chart zoom). Using this method, the chart scrolls by 2 weeks (10 bars) or a single bar when also holding down shift.
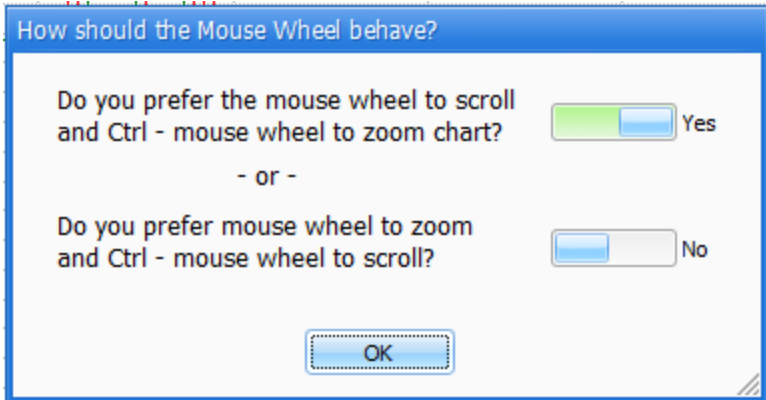
Fig.4.3

4.1.4 Value Lines

There is another more precise method to view the price details and that is by right clicking on the chart and selecting the Value Line as shown on Fig.4.4 . To continue checking the next or previous price details, the keyboard left and right

arrow key will move the Value Line to the left or right one bar at a time. Holding shift and using the left and right keyboard keys will move it 1 week (or 5 bars) at a time. The mouse can also be used to drag the Value Line to any desired data on a chart.

The Value Line also displays values of indicators that have been inserted as separate graphs below the price graph.

The Value Line will be displayed as a vertical red line. The OHLCV data of the security will be displayed to the left or right of the Value Line

Fig.4.4
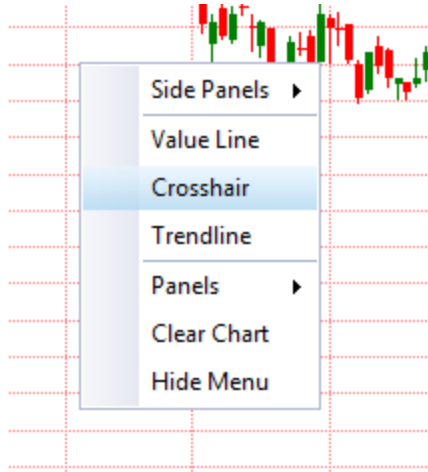
4.1.5 Crosshair

Fig.4.5

The Crosshair is also accessible from the right click menu within a chart window. It does not display the OHLCV data that the Value Line does; it displays both a vertical and horizontal line with date and close value of the price or indicator series. Shown below in Fig.4.6 is a crosshair on a price chart of BHP.XASX. As with the Value Line, the Crosshair can be moved by either the left or right keyboard keys or dragging by the mouse.

Workspace 1 - Beyond Charts

Favourites   **Systems**

Look and Feel

AutoSave | AutoLoad

Workspace

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Tools

Workspace 3 | Workspace 4 | +

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8/11/2013

6/5/2013   12/6/2013   22/7/2013   29/8/2013   8/10/2013   19/11/2013   2/1/2014   6/2/2014   14/3/2014

H 5.37   **L** 5.31   **C** 5.35   **V** 10,005,620   Period: 2600 Bars (Days)   None

Fig.4.6

A unique feature of the Crosshair within Beyond Charts is the horizontal line per series. This enables the user to not only see the value of the close price of the price chart at any point in time, it will display the value of any indicators on that date that are applied as well.

In Fig.4.7 below, BHP has both a Volatility Stop and an ATRVE applied to the chart. The Crosshair that has been applied is displaying values for all series: BHP's close price, Volatility Stop upper and lower limits, as well as the ATRVE value as at the 21/11/2018.
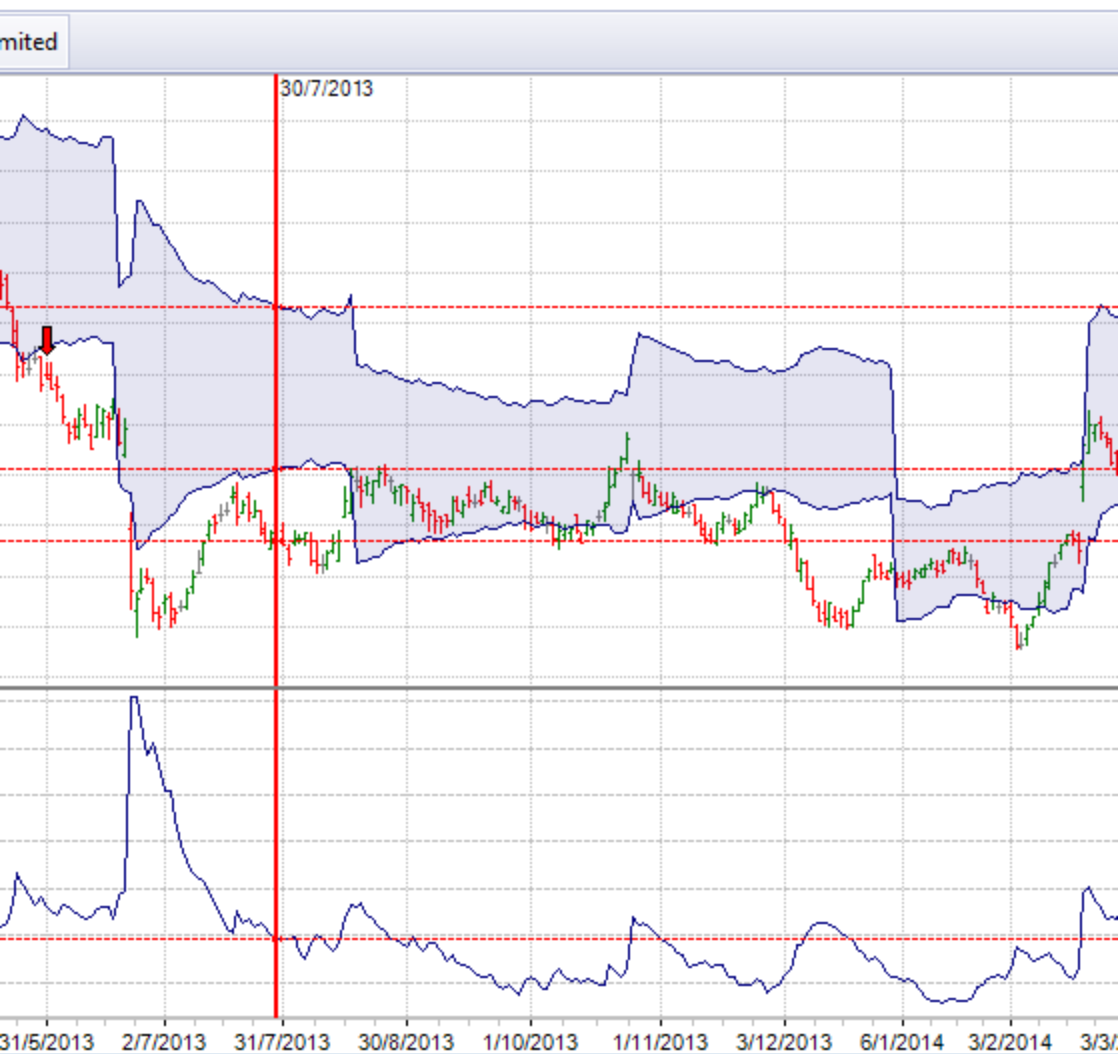
Fig.4.7
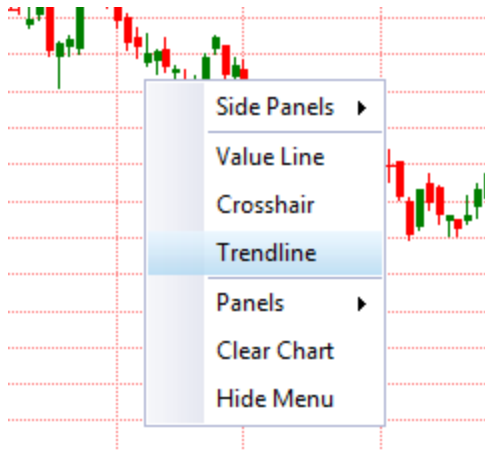
4.1.6 Trend Line

Fig.4.8

Another commonly used Line Study that is available on the right click menu of an open chart window, is the Trend Line. This has been discussed, in section 3.4 - Panels > Line Studies, where a Trend Line can also be applied from, but as it is often used, it is readily available on the right click menu.
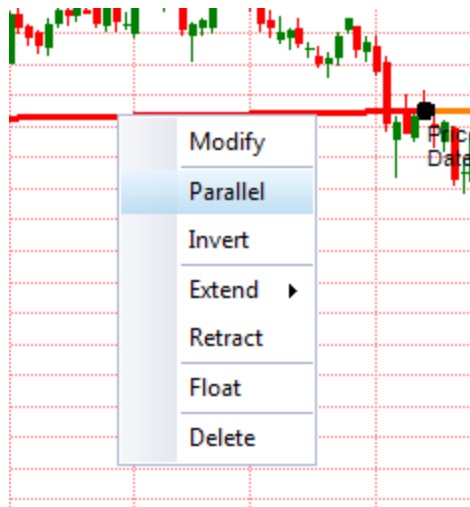
Fig.4.9

Once a Trend Line is applied to the chart, additional options upon right clicking on that Trend line are available: Line Study -> Modify or Delete, Parallel Tend Line -> Parallel or Inverted.

Line Study >Modify allows the user to modify the thickness, colour, transparency, position, extensions and extension colour or delete the Line Study.

Line Study > Delete will remove just the highlighted Line Study.

Parallel Trend Line allows the use to either create an additional Parallel or Inverted trend line created from the already applied one.

4.1.7 Delete Panel
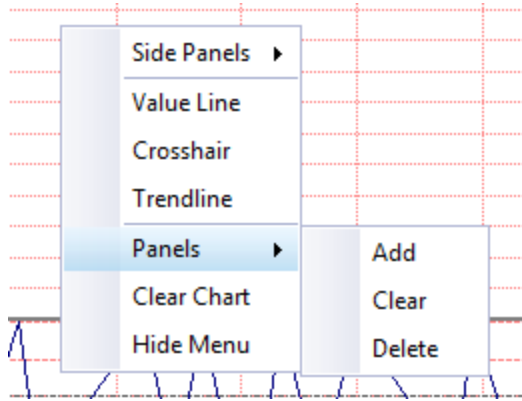
Fig.4.10

TheRemove Panel option shown in Fig.4.10 relates to indicators that have been applied to the chart. This option will only be enabled upon right clicking within a panel of an applied indicator. This gives the user the ability to remove individual panels of indicators, without having to fully clear the chart (explained below).

4.1.8 Clear Chart
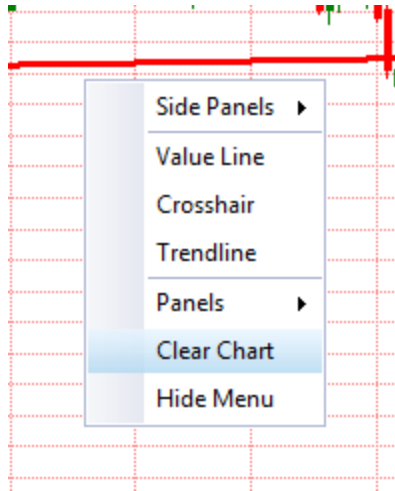
Fig.4.11

Clear Chart enables the user to remove all applied Line Studies or Indicators from the chart, leaving just the price series, along with any signals they have enabled on the chart.

4.1.9 Chart – Signals

mited

| | 2/1/2007 | 1/8/2007 | 29/2/2008 | 30/10/2008 | 1/7/2009 | 29/1/2010 | 2/9/2010 | 1/4/2011 | 3/11/2011 | 26/6 |

L 7.77   C 7.80   V 8,160,175   Period: 2600 Bars (Days)

Fig.4.12

Beyond Charts gives users the ability to display Corporate Actions, Dividend and Notes on the chart.

Using the Signals section in the Chart tab in the top ribbon of Beyond Charts, users can enable or disable the relevant signals they wish to display on the charts.

Tooltips (hints) will show when hovering the mouse over the signals, and double clicking on any of the 'C', 'D' or 'N' signals, will open the relevant child object to the right of the chart if not already open, and highlight the item that was selected.

4.1.9.1 Notes

Enabling the Notes signals in the Chart tab, will display a 'N' signal at the bottom of the chart, for every note that a user has created and selected to 'Show'.

Further information on creating notes is shown below in Section 4.1.11 - Chart > Menu.

4.1.9.2 Dividends

Each of the dividends that are listed in the Dividends object described below in 4.1.11 - Chart > Menu, can be displayed on the chart as a 'D' signal as shown in Fig.4.12 .

4.1.9.3 Corporate Actions

Corporate Actions, when enabled to display on the chart are shown with the signal 'C' can like the dividends, show all the items from within the Corporate Actions object.

4.1.9.4 Indicator Signals

You may apply indicators, including BCFL Indicators, as signals on a chart by right clicking the Indicator once applied and selecting Signal.

The parameters of the Indicator Signals may be modified via right click > Modify.

The Modify Parameters window gives you a variety of options to customize the way you want signals to appear on your chart:

- **Label Properties**
    - **Label –** allows you to attach text to each signal created by the indicator
    - **Position –** allows you to choose the position of the label (Above, Below)
    - **Color –** change the color of the label
- **Signal Properties**
    - **Symbol** - choose any character to represent your signal, from alphanumeric characters to Wingdings.
    - **Position** - choose whether to place the signal Above or Below the equity curve.
- **Style**
    - **Color** - affects the color of the signal and the font color of the legend entry on the upper left of the chart.
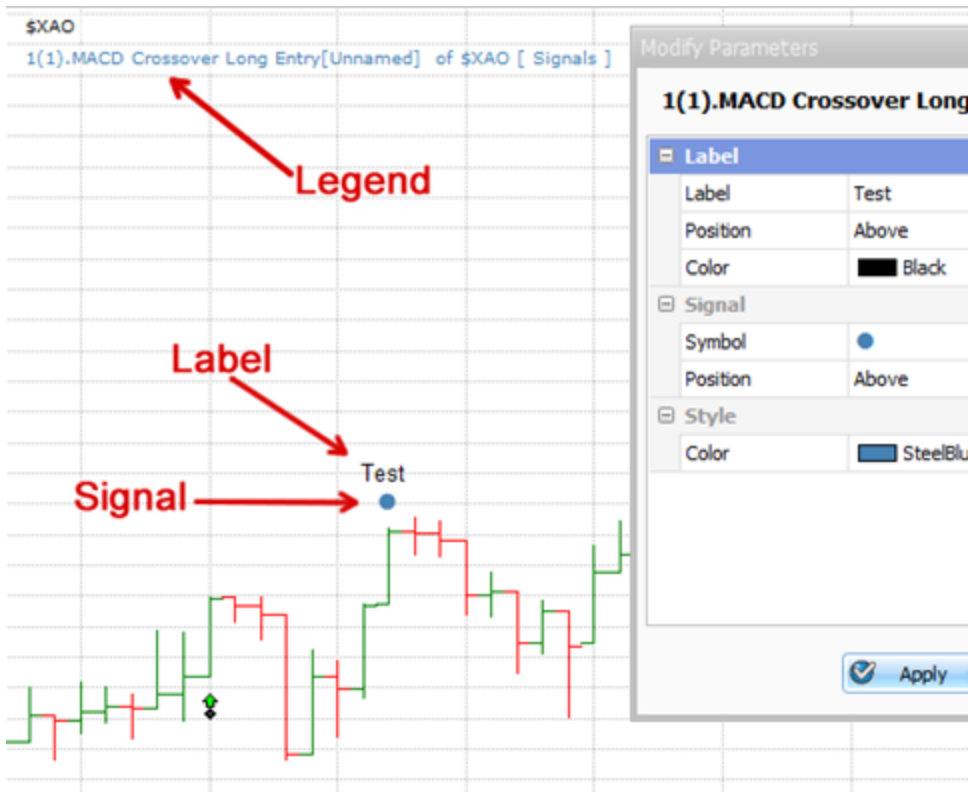
4.1.10 Coloured Ribbon Indicates a Relationship between displayed Windows

The Chart Window can act as the parent of all associated windows. Therefore, when a chart is opened, and then child objects are opened from that chart, the coloured ribbon will automatically match the colours of all other associated windows. See Fig.4.14 below, where all the vertical coloured ribbons are light blue, indicating a relationship between the windows.

The coloured ribbon is shown at the left side of the Chart Window to indicate the relationship between each window, Dividend, Share information, Notes, Corporate Action and Signal Summary. If another chart is opened using the Security Chooser or the security has been navigated to via Pg Up or Down, then the newly opened Security will be displayed and the other associated child windows will be automatically updated with the information applicable to the parent.

The colour of the relationship ribbons is random upon opening charts or data sheets.

If there is a chart open, along with a child object that was opened from a previous parent (i.e. they are not linked), a user is able to manually create a parent / child relationship by dragging and dropping the colour ribbon from either the parent to the child or the child to the parent.

4.1.11 Security Chooser Window

The Security Chooser Window is invisible and will only be displayed when the user types in a Security Code on an opened Chart Window.

To change the Chart to a different security, merely start typing the Security Code or any part of the Security Name using the keyboard. The Security Chooser Window will automatically pop up and start searching for the text typed.

For example, if the currently charted stock is BHP and would like to display Fleetwood and do not know the stock code merely start typing 'F', 'L', 'E'. The Security Chooser window will be displayed as shown in Fig.4.13 .

ace 4 | +

Security Chooser

FWD

Code	Security Name	Exchange
FWD	Fleetwood Corpor...	XASX
FWDB	Madrona Global Bond	ARCX
FWDD	Madrona Domestic	ARCX
FWDI	Madrona Internati...	ARCX

Record 1 of 4

OK Cancel

2007 1/8/2007 29/2/2008 30/10/2008 1/7/2009 29/1/2010 2/9/2010 1/4/2011 3/11/2011 26/6/2

42 **C** 5.48 **V** 9,258,631 Period: 2600 Bars (Days)

Fig.4.13

Once the desired security is shown in the list, double click the Security Name displayed or if a complete security code has been typed in correctly, pressing [Enter] will automatically replace the Chart of the previous security with the newly selected security.

Alternatively, the "Open Security Chooser" icon at the top right of the chart window can be clicked to pop the Security Chooser.

All the indicators or opened child windows such as Dividend; Share Information will be maintained and the codes on the title bar of each window will be update to match the newly opened Chart. Therefore, the parent-child relationship of each opened window will remain connected as shown on Fig.4.14 .
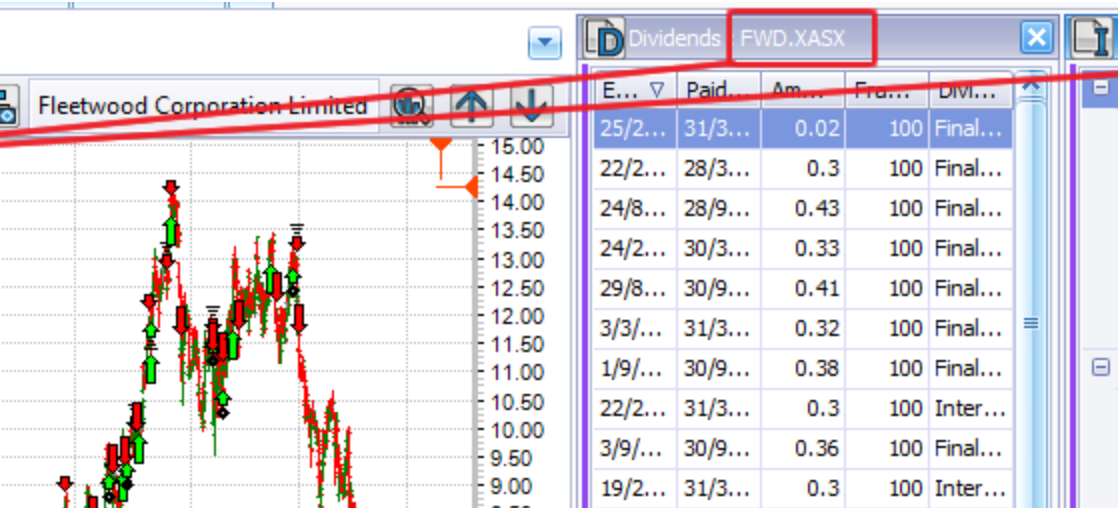
Fig.4.14

4.1.12 Chart – Menu

There are 5 Menus available at the top of the Chart Window:

- Notes
- Dividend
- Corporate Actions
- Share Information
- Signals
- Web Link
- • Watch List

4.1.12.1 Notes
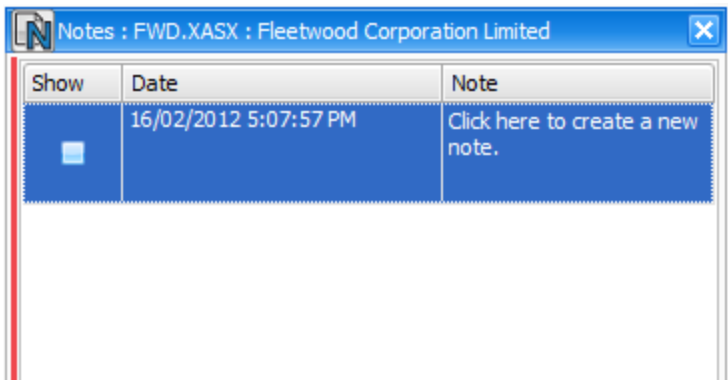
Fig.4.15

The Notes window allows users to add text notes by date related to a particular security. The notes will be saved automatically and will remain saved until the Note is deleted.

The current date will be displayed in the Date Column. The user can amend the Date by clicking on the drop down arrow on the right side of the date specified to view the calendar, as shown in Fig.4.16 .
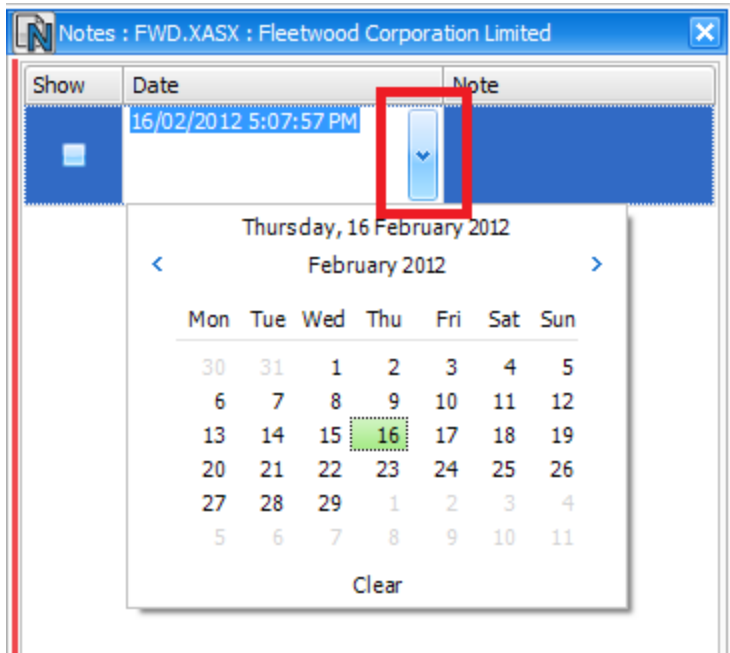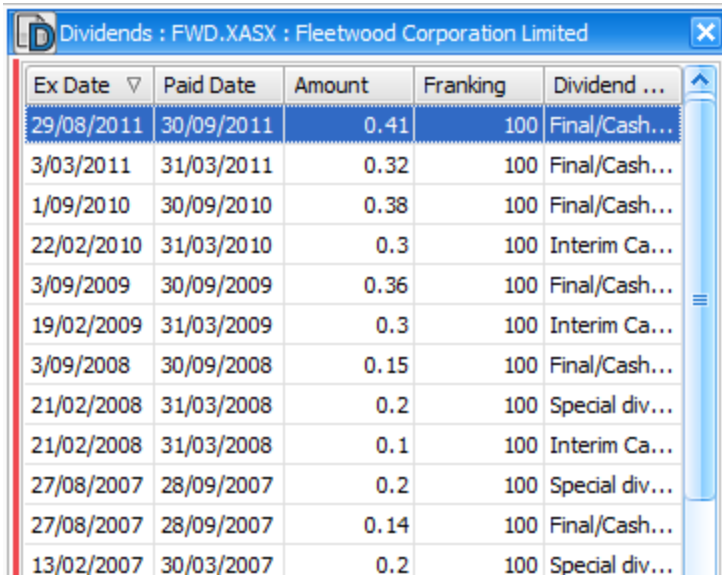
Fig.4.16

To add a note, simply click in the empty column right below the Notes Column header and start typing a note. Once completed, click anywhere in the Notes window. A blank note with the current date will be created as a New Empty Note.

The Show option in the Note Window allows user to display the Notes on the Chart of the relevant security as "N" Signals.

4.1.12.2 Dividend

Ex Date ▽	Paid Date	Amount	Franking	Dividend ...
29/08/2011	30/09/2011	0.41	100	Final/Cash...
3/03/2011	31/03/2011	0.32	100	Final/Cash...
1/09/2010	30/09/2010	0.38	100	Final/Cash...
22/02/2010	31/03/2010	0.3	100	Interim Ca...
3/09/2009	30/09/2009	0.36	100	Final/Cash...
19/02/2009	31/03/2009	0.3	100	Interim Ca...
3/09/2008	30/09/2008	0.15	100	Final/Cash...
21/02/2008	31/03/2008	0.2	100	Special div...
21/02/2008	31/03/2008	0.1	100	Interim Ca...
27/08/2007	28/09/2007	0.2	100	Special div...
27/08/2007	28/09/2007	0.14	100	Final/Cash...
13/02/2007	30/03/2007	0.2	100	Special div...

Dividends : FWD.XASX : Fleetwood Corporation Limited

Fig.4.17
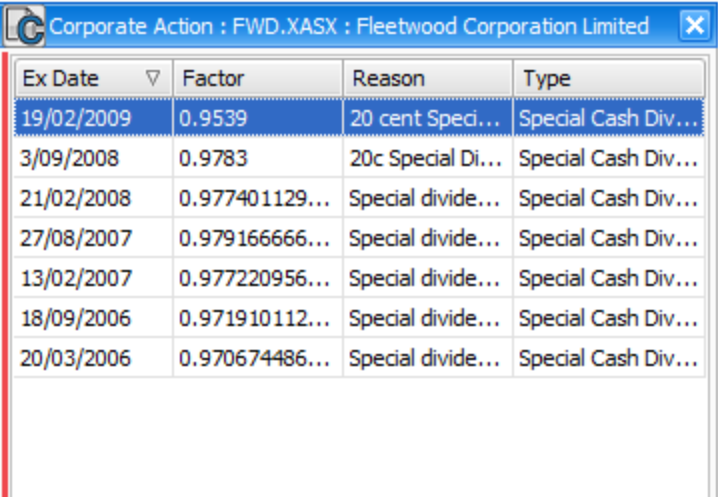
The Dividend Window will display the entire Dividend history for the selected Security. The table contains the following details: Ex Date, Paid Date, Amount, Franking and Dividend Type.

There will be 3 different types of Dividend:

- Interim Dividend
- Special Dividend
- Final Dividend

The Interim and Final Dividends are usually updated for 6 months depending on the reporting date of the particular Security selected. A Special Dividend can be paid by a company separate from the typical recurring Interim and Final dividend cycle.   Fig.4.17 shows an example of the Dividend Window in the Beyond Charts.

4.1.12.3 Corporate Action

Fig.4.18

Any corporate actions relating to a security will be displayed in the Corporate Action. If any unusual price drop or split is visible on the chart, chances are that there may be some corporate action related to that price action.

There are 4 columns displayed in the Corporate Action table:

- Ex Date
- Factor
- Reason
- Type

4.1.12.4 Share Information

Share Information : FWD.XASX : Fleetwood Corporation Limited	
Security	
Type Description	Ordinary Fully Paid
Type	Fully Paid Ordinary/Common Stock
Instrument	Stocks
SX	XASX
Security Name	Fleetwood Corporation Limited
Code	FWD
Last Price Statistics	
52 Week High Price	14.000
52 Week Low Price	9.530
52 Week High Date	15/02/2011
52 Week Low Date	9/08/2011
Close to Close Move %	-0.47
Close to Close Move	-0.060
Last Price	
ICB Classification	
GICS Classification	
Fundamentals	

Fig.4.19

The Share Information window, Fig.4.19 displays a variety of technical and fundamental information for the selected Security. The data is divided into 6 groups:

- Security
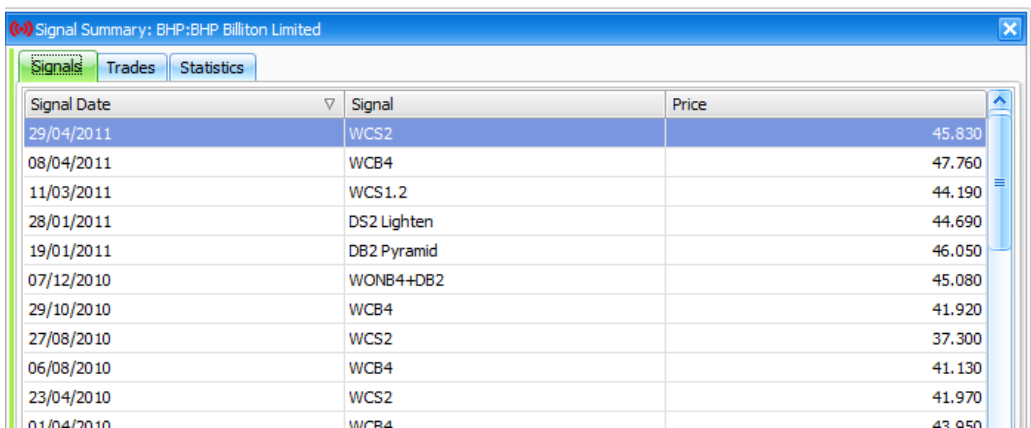
- Last Price Statistics

- Last Price

- ICB Classification

- GICS (Global Industry Classification System)

- Fundamentals

The Fundamentals group currently includes the latest PE Ratio, EPS, DPS, Market Cap and NTA. This information can also be displayed, sorted and filtered in the Data Sheet functionality, using the column chooser discussed in section 4.2.1.3 below.

To view details of each group, click on the (+) symbol to expand the list.

4.1.12.5 Signals

Signal Date	Signal	Price
29/04/2011	WCS2	45.830
08/04/2011	WCB4	47.760
11/03/2011	WCS1.2	44.190
28/01/2011	DS2 Lighten	44.690
19/01/2011	DB2 Pyramid	46.050
07/12/2010	WONB4+DB2	45.080
29/10/2010	WCB4	41.920
27/08/2010	WCS2	37.300
06/08/2010	WCB4	41.130
23/04/2010	WCS2	41.970
01/04/2010	WCB4	43.950

Signal Summary: BHP:BHP Billiton Limited — Signals / Trades / Statistics

Fig.4.20

The signals object opened via the chart window, will display the individual signals, trades and statistics information for the signals visible on the chart. These could be either BCFL signals or any other signals that are programmed into Beyond Charts.

4.1.12.6 Web Link
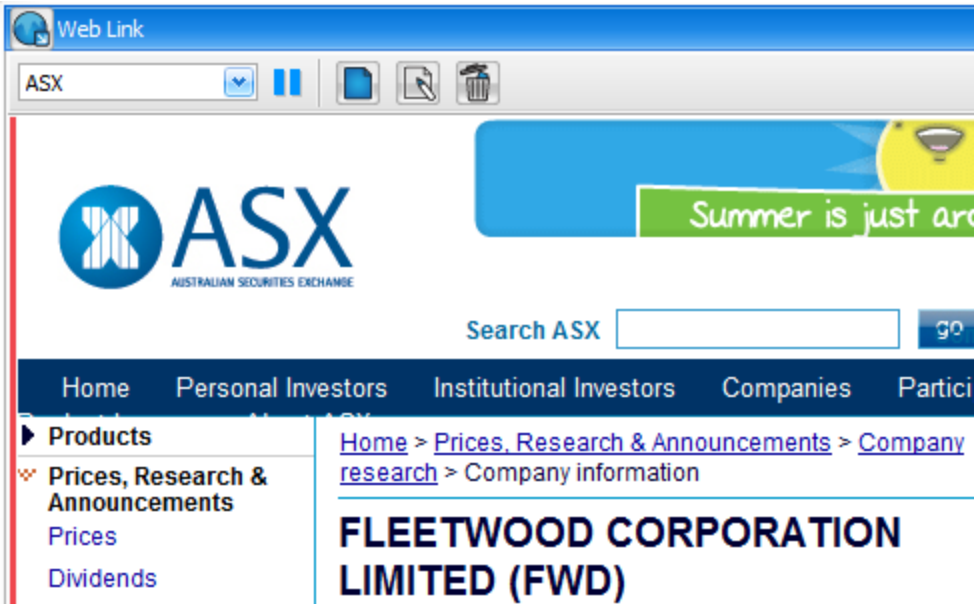
The Web Link object gives the user the ability to browse both default and user defined websites from with Beyond Charts. This is useful to quickly browse for announcements and the like on securities all from within the program and not an external browser. It currently comes with 5 default News Feeds pertaining to the ASX shown below.

Users can change between the News Feeds by selecting the desired one from the drop down list, once chosen the Web Link browser will refresh to that chosen News Feed.
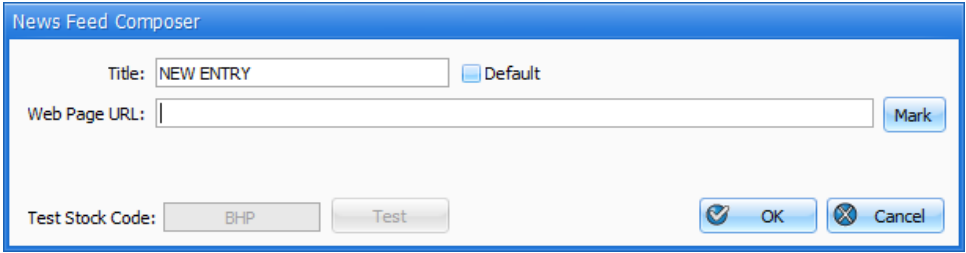
The Web Link browser also refreshes to display the relevant share code according to the focused chart, or line item within a datasheet. A Web Link browser that has been opened from a chart will update to the new security when the user changes by paging down (usually when looking through a watchlist) or changing the security via the securities chooser (typing directly on the chart).

A Web Link browser that has been opened from a datasheet of a number of securities, will update to the new security when the user selects a new line item within that datasheet.

Pressing **Pause** will stop this automatic refresh occuring until unpaused. This is useful if you wish to continue looking at one particular securities News, but want to view another's chart without the need of opening a fresh chart.
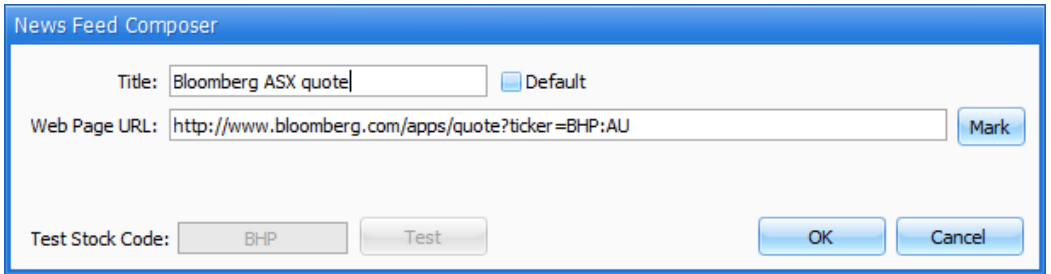
The **New** option, allows the user to create their own News Feeds. This is useful for those users trading different exchanges, or simply those that prefer a different news website over the defaults.
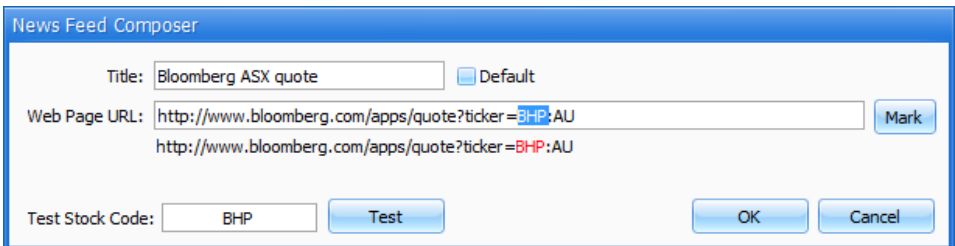
News Feed Composer

Title: NEW ENTRY   ☐ Default

Web Page URL: | Mark

Test Stock Code: [BHP] [Test]   ✔ OK   ✖ Cancel

To create a new News Feed, simply give it a title (replace NEW ENTRY), select whether it should be the default or not and paste in an example of your chosen webpage that is looking at a security.

News Feed Composer

Title: Bloomberg ASX quote| ☐ Default

Web Page URL: http://www.bloomberg.com/apps/quote?ticker=BHP:AU   Mark

Test Stock Code: [BHP] [Test]   OK   Cancel

The News Feed Composer then requires the user to **Mark** the place in the web address when the physical security code resides. This gives it the ability to change the code dynamically, depending on what security the user is viewing. Simply highlight the code using the mouse and select **Mark** on the right of the address.

News Feed Composer

Title: Bloomberg ASX quote   ☐ Default

Web Page URL: http://www.bloomberg.com/apps/quote?ticker=BHP:AU   Mark
http://www.bloomberg.com/apps/quote?ticker=BHP:AU

Test Stock Code: [BHP] [Test]   OK   Cancel

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Users have the option to **Test** the created News Feed before saving it, by entering in a Test Stock Code and clicking **Test**. Once satisfied all is working as it should, clicking **OK** will save that News Feed into the list.

If any of the News Feeds need to be edited, selecting it from the list and clicking the **Edit** button at the top of the News on Stocks browser will bring up the News Feed Composer again, giving the user the ability to edit the name and / or the Web Page URL.

If any of the News Feeds need to be deleted, selecting it from the list and clicking **Delete** will remove that news feed permenantly from the News Feed list.

4.1.12.7 Watch List

The Watch List object allows you to add the currently open chart to your desired Watch List. You can either select an existing Watch List or define a new Watch List.
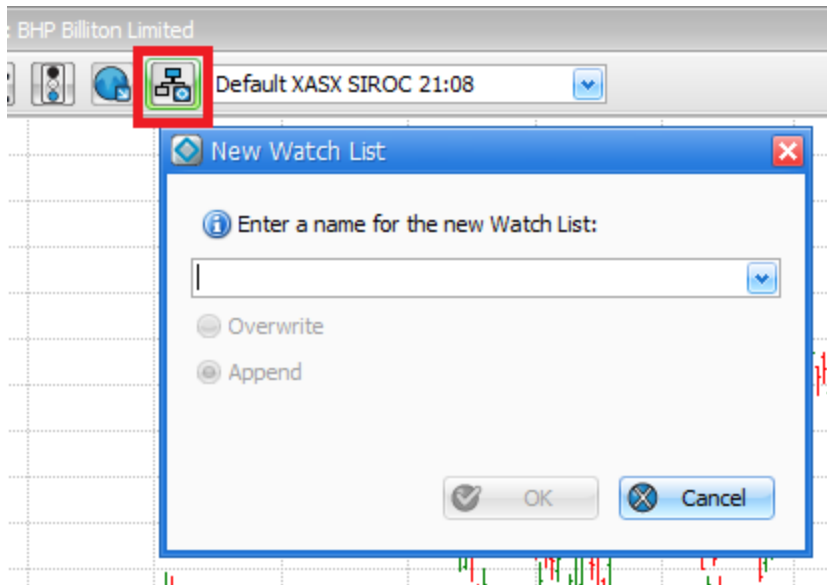
4.1.13 Chart Indicator Legend

A list of all the applied indicators in a panel on the chart are viewable in the top left corner. If you are viewing many indicators as a part of your analysis or overlay or you have a smaller screen, you can compact the list by right click on any of the indicators and select 'Compact Legend' from the end of the list..
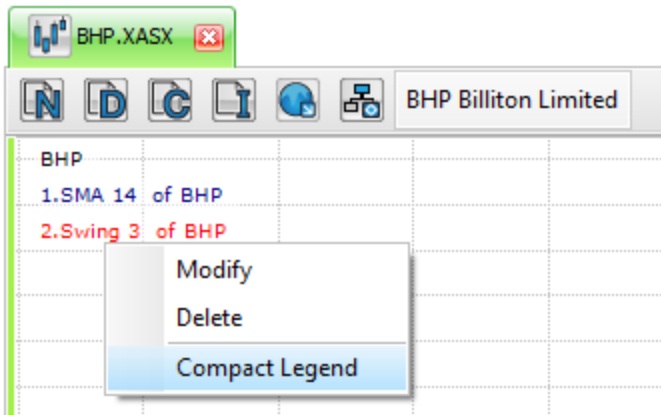
You can also use this list to modify the indicators, see section 4.1.9.4 for more details.

4.1.14 Y-Axis Labels

Y-Axis labels will show the last bar value for indicators and price action on your chart (price action displayed is the last closing price). This allows you to have a reference as you scroll through the historical data on a chart.
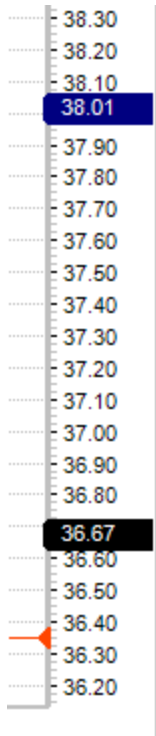
These labels can be hidden by right clicking any of the labels shown on the axis.

4.1.15 Tooltips

If a user hovers their mouse over the bar of a chart or an indicator series, the relevant data values for that series will appear after a few short seconds as a 'tool tip'. This helps the user quickly identify relevant data for a particular trading day. Information provided in tool tips:

- Date
- Open / High / Low / Close
- Volume
- Indicator Values

Tooltips do not display the values of Line Studies.

BIB

Date:	21/03/2014
Open:	96.95
High:	97.25
Low:	86.76
Close:	87.28
Volume:	892,004

4.2 Data Sheet

...de	Securit...	Exchange	Type	GICS S...	ICB Ind...	Open	High	Low	Close	Volume	Trading...	Last Date	Marke
PD	Expedit...	XNAS	Fully Pai...	Industrials	Industrials	38.970	39.400	38.810	39.180	2,481,047	Traded	27/2/2014	8,086
...TC	Intel Corp	XNAS	Fully Pai...	Informa...	Technol...	24.740	24.800	24.510	24.750	17,659,...	Traded	27/2/2014	123,3
...DC	Wester...	XNAS	Fully Pai...	Informa...	Technol...	88.900	89.200	87.530	88.420	1,679,643	Traded	27/2/2014	20,95
...LX	Netflix Inc	XNAS	Fully Pai...	Consum...	Consum...	447.840	453.690	447.840	452.060	1,408,245	Traded	27/2/2014	26,63
...LG	Celgene	XNAS	Fully Pai...	Health ...	Health ...	160.390	162.060	158.640	161.670	2,600,458	Traded	27/2/2014	66,49
...ST	Monster...	XNAS	Fully Pai...	Consum...	Consum...	72.040	72.070	70.690	71.160	2,036,161	Traded	27/2/2014	11,91
...MN	Garmin Ltd	XNAS	Fully Pai...	Consum...	Technol...	51.970	53.560	51.850	53.540	2,705,940	Traded	27/2/2014	11,14
...V	Directv	XNAS	Fully Pai...	Consum...	Consum...	74.750	76.300	74.750	76.120	3,574,707	Traded	27/2/2014	41,78
...N	Illumina ...	XNAS	Fully Pai...	Health ...	Health ...	178.920	181.600	178.000	178.110	2,244,908	Traded	27/2/2014	22,28
...V	F5 Netw...	XNAS	Fully Pai...	Informa...	Technol...	113.360	114.860	112.560	114.510	1,158,759	Traded	27/2/2014	8,966
...L	Sigma Al...	XNAS	Fully Pai...	Materials	Basic M...	93.840	94.230	93.630	93.850	359,913	Traded	27/2/2014	11,28
...X	Seagate...	XNAS	Fully Pai...	Informa...	Technol...	51.690	52.030	51.040	51.920	1,837,909	Traded	27/2/2014	18,52
...YA	Liberty ...	XNAS	Fully Pai...	Consum...	Consum...	84.630	85.500	84.200	85.330	1,214,535	Traded	27/2/2014	18,01
...OG	Google I...	XNAS	Fully Pai...	Informa...	Technol...	1,218.390	1,224.230	1,217.010	1,219.210	1,246,622	Traded	27/2/2014	406,0
...B	Viacom I...	XNAS	Fully Pai...	Consum...	Consum...	86.090	87.040	85.790	86.860	2,004,604	Trading	27/2/2014	36,98
...GN	Regene...	XNAS	Fully Pai...	Health ...	Health ...	335.000	342.200	334.050	338.540	774,006	Traded	27/2/2014	33,43
...XN	Alexion ...	XNAS	Fully Pai...	Health ...	Health ...	182.270	184.840	181.650	183.890	774,987	Traded	27/2/2014	35,96
...ZN	Amazon...	XNAS	Fully Pai...	Consum...	Consum...	357.840	360.590	355.500	360.130	3,082,413	Traded	27/2/2014	164,5
...TR	Dollar Tr...	XNAS	Fully Pai...	Consum...	Consum...	55.040	55.630	54.620	54.660	4,164,625	Traded	27/2/2014	12,18
...KP	Check P...	XNAS	Fully Pai...	Informa...	Technol...	67.920	68.140	67.450	68.080	885,261	Traded	27/2/2014	13,54
...TR	Altera C...	XNAS	Fully Pai...	Informa...	Technol...	36.460	36.460	36.030	36.250	2,381,316	Traded	27/2/2014	11,58
...LN	Priceline...	XNAS	Fully Pai...	Consum...	Consum...	1,353.550	1,363.090	1,350.000	1,358.330	545,466	Traded	27/2/2014	69,95
...V	Fiserv Inc	XNAS	Fully Pai...	Informa...	Industrials	57.660	58.340	57.490	57.990	825,822	Traded	27/2/2014	7,543
...UX	Starbuc...	XNAS	Fully Pai...	Consum...	Consum...	71.530	72.240	71.430	72.190	5,611,529	Traded	27/2/2014	54,24
...U	Intuit Inc	XNAS	Fully Pai...	Informa...	Technol...	77.670	78.160	77.090	78.130	1,115,149	Traded	27/2/2014	23,19

Record 1 of 100

Formula Editor $XAO.XASX   NASDAQ 100

Fig.4.21

A Data Sheet Window displays information for a list of securities. The information encompasses: prices, fundamental data, recent trade data and exchange information and is displayed in columns next to the securities code.
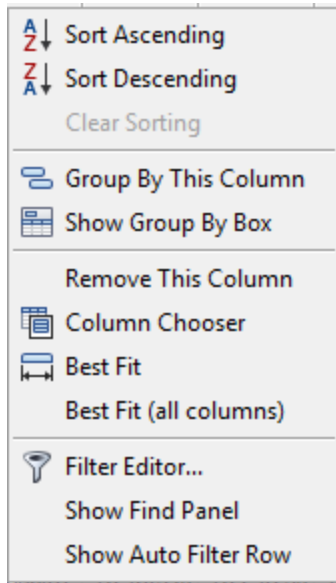
Fig.4.22

Users can customise the Data Sheet window by right clicking any of the columns within the datasheet and calling up the right click menu. The following options are available as shown in Fig.4.22 .

- Sort Ascending / Descending

- Clear Sorting

- Group By This Column

- Show Group By Box

- Remove this Column

- Column Chooser

- Best Fit

- Best Fit (all columns)

- Filter Editor

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4.2.1.1 Sort Ascending / Descending

The Sort Ascending / Descending is able to be used on any column within the datasheet to sort the data to the users preference. This can be done over as many columns as desired.

The Clear Sorting is performed on individual columns where sorting has previously been applied.

4.2.1.2 Group by this column

The Group by this Column allows the user to further sort the datasheet into groups. For example, a large datasheet of securities could be grouped by Sector or Type. The datasheet can be grouped by as many columns as the user wishes, therefore using the above example, it could be first grouped by GICS Sector, then by Type as shown in Fig.4.23 .

Fig.4.23

The Show Group by box will display the grouping applied above the columns, right clicking any of the columns again will allow the user to Hide Group by box if needed.

To remove any of the groupings that have been applied to a datasheet, right click on the group to be removed at the top of the datasheet once shown, and select Ungroup.

4.2.1.3 Column Chooser

To view the column chooser option, Right click on any of the Column Header and select Column Chooser. For further information on adding columns and removing columns refer to the General Terms topic in section 1.3.4.

4.2.1.4 Best Fit

The Best Fit and Best Fit (all columns) is a feature that will resize the columns to the best size for the window it is being displayed in. The more columns that are added to the datasheet, the more the columns are compressed, so the best fit option allows the user to even the columns up and optimise their size.

4.2.1.5 Filter Editor

This applies to Data Sheet & Scan Results.

4.2.1.5.1 Introduction

The Filter functionality of the Data Sheet is a powerful and quick way to isolate securities that meet a set of conditions within each column. Very simple filters can be created within seconds. For example, Fig.4.24 is a filter to only show Securities that "Start with 'A' AND have a Close above $5".
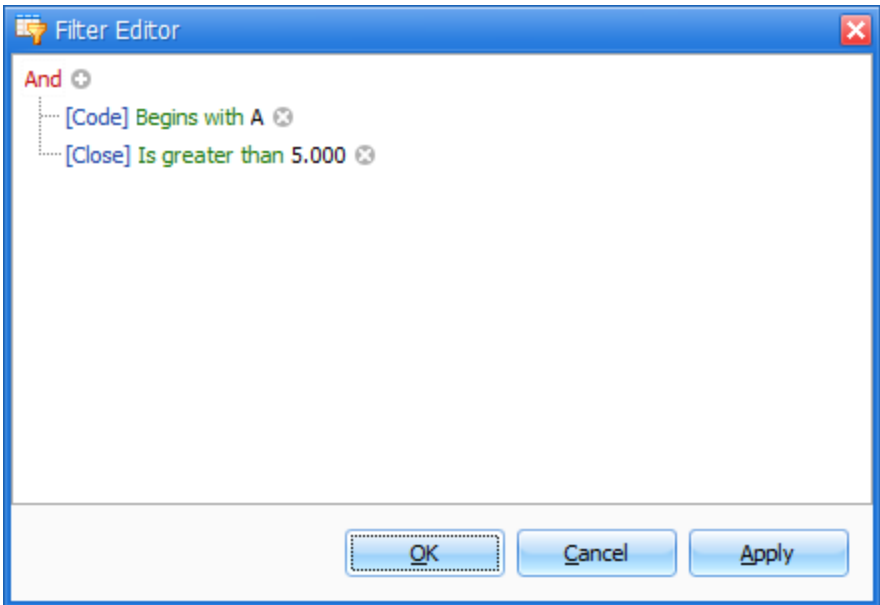
Fig.4.24

Conditions can be grouped to build filters with opposing or complex conditions. Each Condition group is combined using simple logic statements. For example, Fig.4.25 is a filter to only show Securities that "Start with 'A' AND have a Close above $5" OR "Are in the GICS Sector of Energy AND have a Close below $5". The condition groups can be combining both vertically and horizontally to create very complex filters.
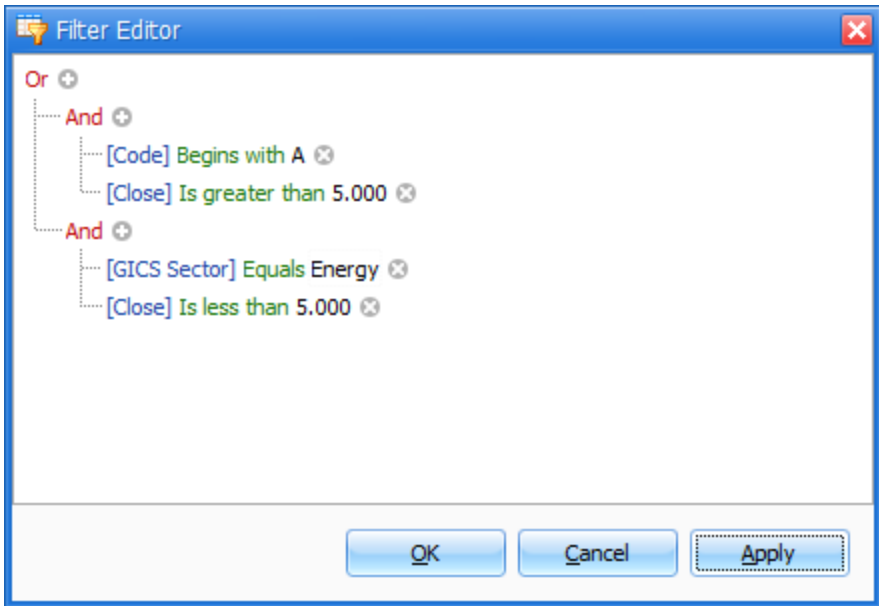
Fig.4.25

4.2.1.5.2 Opening the Filter Editor

To open the Filter editor:

Right click on any column header and select Filter Editor, or

If no filter exists, it will open with one condition ready for input, as per Fig.4.26 .
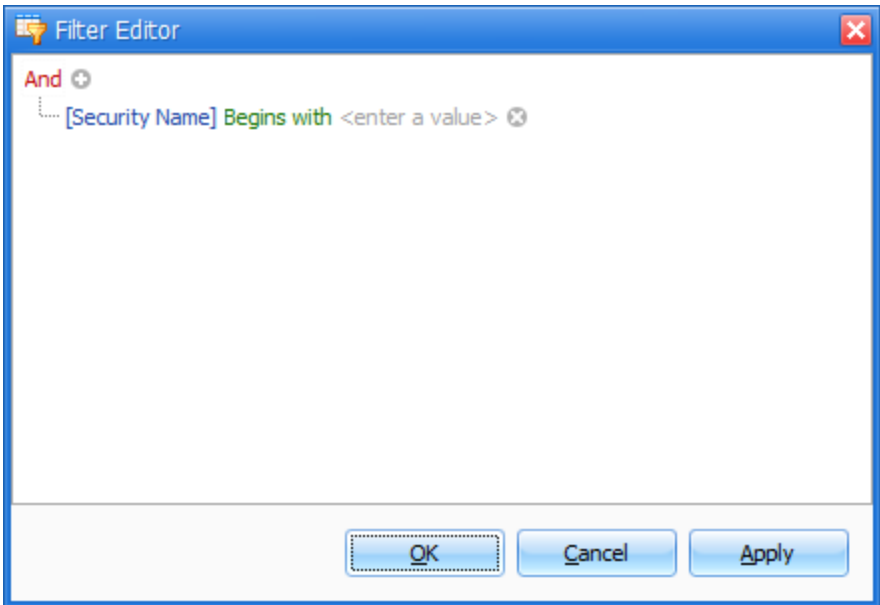
Fig.4.26

4.2.1.5.3 Editing a filter

There are usually three parts of every condition that you must specify; two Inputs and an Operator. For some Operators the second input is not required.

- The first input is a [Column name]. Left click the input and select from any shown or hidden column. The column does not have to be shown to be used in a filter.

- The Operator is a mathematical or logical criteria applied to the inputs. E.g. "> Is Greater Than", "Contains", = Equal". Left click the operator and selected from the drop down list

- The second input is a numerical value, alphabetic characters or a date that complete the condition. E.g. 5, A, Energy, 18/8/2011. Left click on <Enter a Value> and type in the required input.

To add another condition:

- Press the 'Insert' key on your keyboard, or
- Press the '+' key on your keyboard, or
- Left click the (+) symbol next to the group logical text, or
- Left click the group logic text and select Add Condition from the menu.

To add a group of conditions to the current level:

- Left click the group logic text and select Add Group from the menu.

To delete a condition:

- Press the 'Delete' key on your keyboard, or
- Press the -' key on your keyboard, or
- Left click the (x) symbol next to the condition.

To delete a group of conditions:

- Left click the group logic text and select Remove Group from the menu.

4.2.2 Data Sheet - Menu

At the top of the Data Sheet Window, the following icons are available for selection:

- Chart
- Notes
- Dividends
- Corporate Actions
- Share Information
- Web Link

- Save as Watch List
- Delete

4.2.2.1 Chart

Click the chart icon to display a chart of the selected security from within a datasheet. That chart window will contain only the securities that are listed in that particular datasheet and can be scrolled through using the Page UP / DOWN on the keyboard as described previously.

4.2.2.2 Notes / Dividends / Corporate Actions / Share Info

The Notes, Dividends, Corporate Actions and Share Information icons all behave in the same way as the Chart window icons as described above in Section 4.2.1.

4.2.2.3 Web Link

The Web Link object gives the user the ability to browse both default and user defined websites from with Beyond Charts. This is useful to quickly browse for announcements and the like on securities all from within the program and not an external browser. It is covered in more detail in Section 4.1.11.6 > Chart Menu > Web Link.

4.2.2.4 Save as Watch List
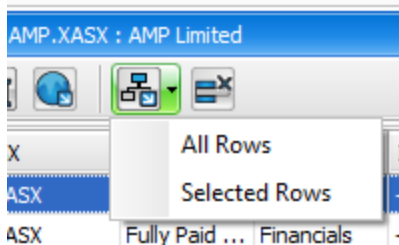
Fig.4.27

The Save as Watch List is broken into 2 selections:

- All Rows

This enables the user to create a Watch List using all the items contained within that datasheet.

- Selected Rows

This creates a Watch List of the selected rows in the datasheet. Multiple rows can be selected by holding SHIFT and highlighting a selection, or holding CNTRL and highlighting multiple.
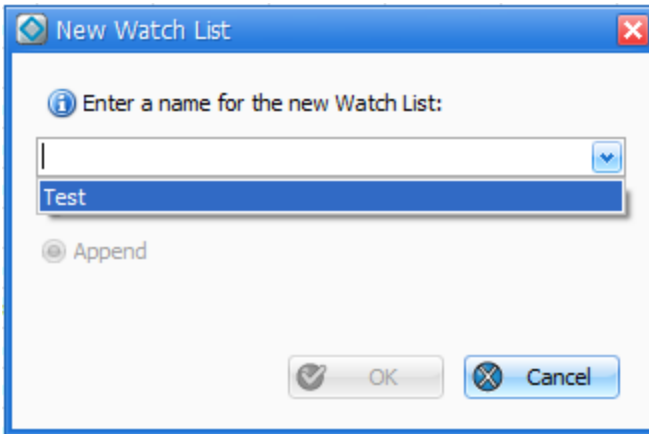
Fig.4.28

When creating a Watch List from a datasheet or Scan result table, an entirely new Watch List can be created by specifying a unique name and clicking [OK]. If the name typed in already exists, users are able to either Overwrite or Append the existing Watch List. This is useful for those users that update or create Watch Lists daily, and rather than creating a new Watch List each and every time, an existing Watch List can be added to or replaced.

You may also add a stock to your Watch List from a datasheet via the right click menu > WatchList
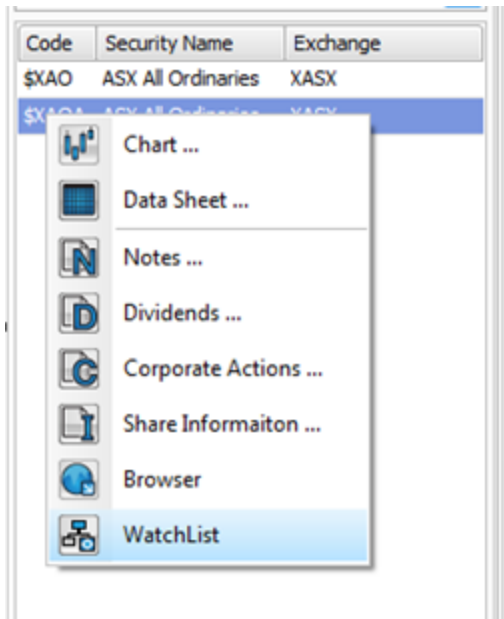
4.2.2.5 Delete

Individual or multiple securities can be deleted from a datasheet using the Delete icon. If the datasheet is created from multiple securities for the Securities Explorer, deleting securities will remove any unwanted items from that particular datasheet. It has no other impact on anything else within in Beyond Charts.

Datasheets of Industry Watch Lists or locked My Watch Lists are unable to be edited, therefore the delete icon will do nothing on these datasheets.

If the datasheet is of an unlocked User's Watch List, deleting from the datasheet will modify that particular Watch List which is a physical change.

Using the datasheet, users can not only manage and maintain Watch Lists via the Watch List Manager, they can add items to a datasheet of their Watch List by dragging securities from the Securities Explorer and dropping them directly onto

the datasheet. They can also remove items via the delete icon as described above.

4.2.2.6 Decimal Places
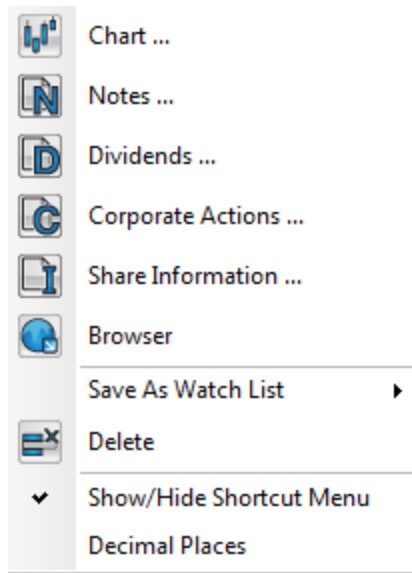
Fig.4.29

Available from the right click menu shown above in Fig.4.29 , within the datasheet, users have the ability, similar to the charts, to modify the number of decimal places that are displayed. The default that a datasheet will open with is 3 decimal places. To modify this to show the required number, right click within or on an item within the datasheet and select Decimal Places.

Fig.4.30

Once the modify Parameters window appears, change the Decimal Places to the required number and click [Apply].

The datasheet will then show the specified number of decimal places.

4 WINDOWS

5

WORKSPACES

Beyond Charts allows users to save both Application Settings and Window Layouts using the Workspace feature. Beyond Charts can save multiple workspaces via the Workspace Manager.

This allows things such as docked panels, preferred Data Mode, Chart Type, Period along with objects that are open, to be saved either manually or on exiting the program, so that they can be recalled upon start up or manually recalled when required by the user.

The following topics are covered in this chapter:

- Application Settings
- Window Layouts
- Hibernate on Close

5.1 Application Settings

Application Settings refer to everything outside of the window objects in Beyond Charts. These include settings / preferences in the Navigation tabs in the Beyond Charts ribbon, such as preferred Look and Feel in the Home tab, along with Period, Data Mode, Chart Type, Signals and Auto Load: Analyses / Overlays in the Chart tab as shown in Fig.5.1 .
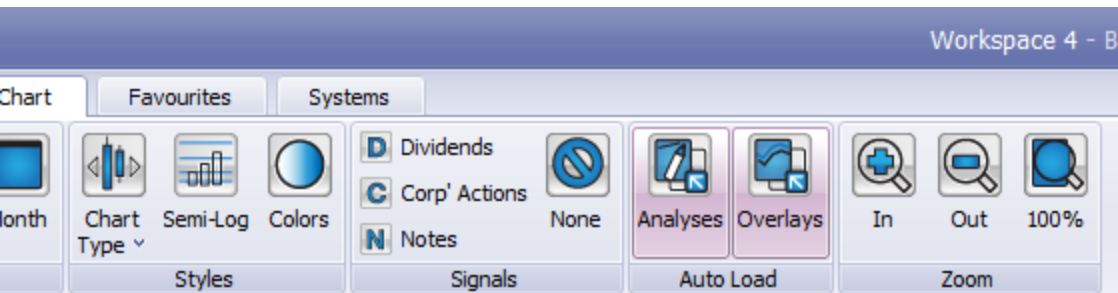
Fig.5.1

Saving Application Settings also saves the current panels that are docked open, and also last used / highlighted items within those panels.

5.1.1 Saving Application Settings

The Application Settings in Beyond Charts are saved upon exiting the program only. Users are presented with a prompt on exit as shown in Fig.5.2 which allows them to select which workspace settings to save.
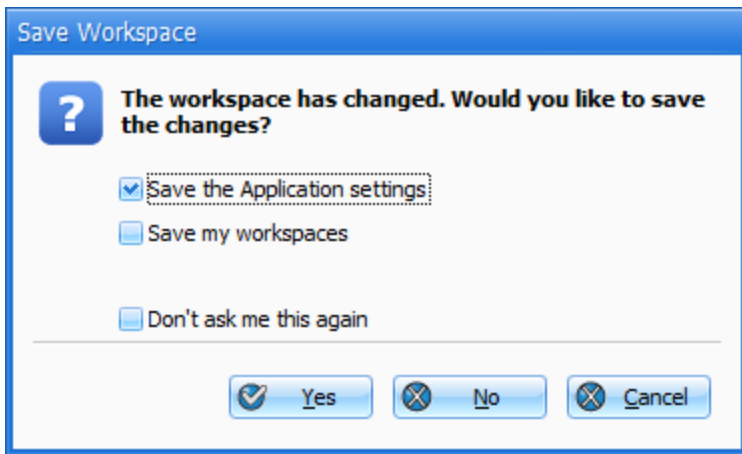
Fig.5.2

The Don't ask me again option will remember the preferred options (either 1, both or none) and not prompt you again. This can be reset by turning the AutoSave on then off.

5.1.2 Loading Application Settings

Application Settings will always load upon starting Beyond Charts regardless of whether or not it loads Window Layouts (discussed below). If a user has chosen not to save Application Settings when Beyond Charts is closed, and there are no previous Application Settings to load, no workspace loads and Beyond Charts opens with default settings. If there are previous Application Settings saved in the database, they will load on start up. The only way to remove these saved settings is to use the Repairs, Clear Saved Workspace tool in the application menu next to the Home tab.

5.2 Window Layouts

Window Layouts refer to any of the objects that open in the main container of Beyond Charts. Things such as Chart, Datasheet, Scans and the Notes, Dividends, Corporate Actions and Share Information objects.

Note that any unsaved analysis or indicators applied to the chart will not be saved as part of the Window Layouts, this is the Analyses Manager's job and if the work is important, we recommend saving it into the Analyses Manager before exiting Beyond Charts. The Hibernate on Close option (discussed below) can be used to save 'on-the-fly' analysis, but is easily lost

5.2.1 Saving Window Layouts

There are numerous ways of saving Window Layouts in Beyond Charts. The user can either save on exit, or manually via the Workspace Manager.

5.2.1.1 On exit

As with saving Application Settings, users can save their current Window Layouts via the prompt on exit, with the Save my Window layouts option as shown in Fig.5.3 .
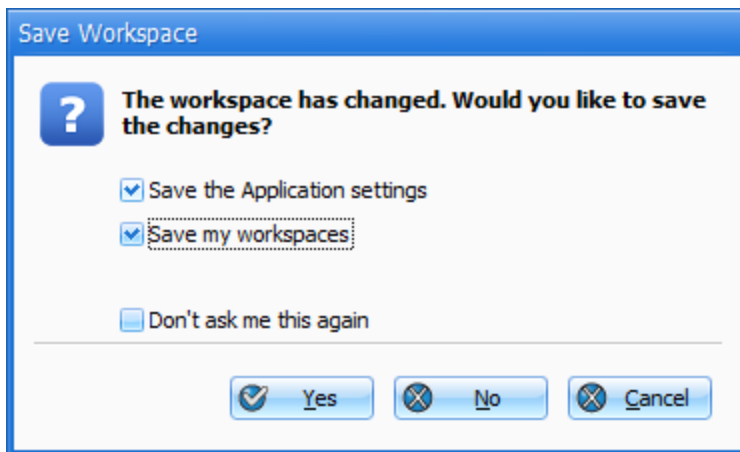
© Copyright Quantum Methodologies

Fig.5.3

5.2.1.2 Manual 'Save'

In the Workspace Manager of Beyond Charts, users can manually save their current Window layouts by clicking Save All or Save Current. Fig.5.4 . Users can also right click on any of their Workspace tabs in order to save as well.
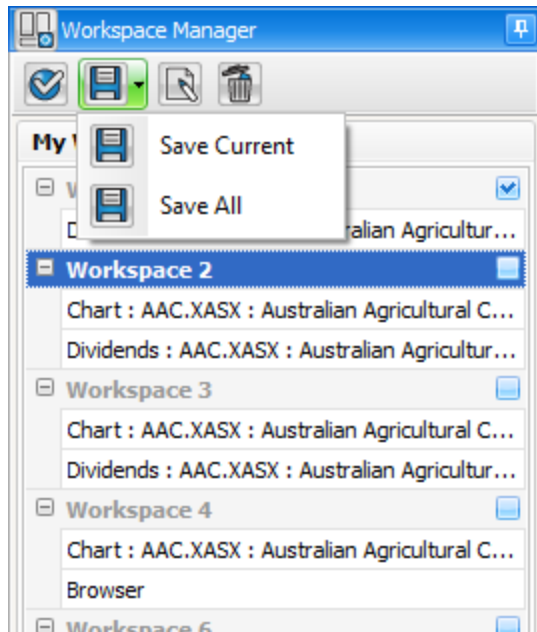
Fig.5.4
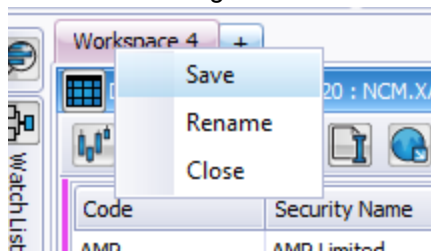
5.2.1.3 AutoSave

By turning the AutoSave option on in the Workspace section of the Home tab of Beyond Charts (as shown in Fig.5.5), Beyond Charts will automatically save both the Application Settings and Window Layouts on exit without prompting. Used in conjunction with the AutoLoad option (covered below) this allows Beyond Charts, to automatically save current settings and layout on exiting (without prompt) and automatically load them back on start up.
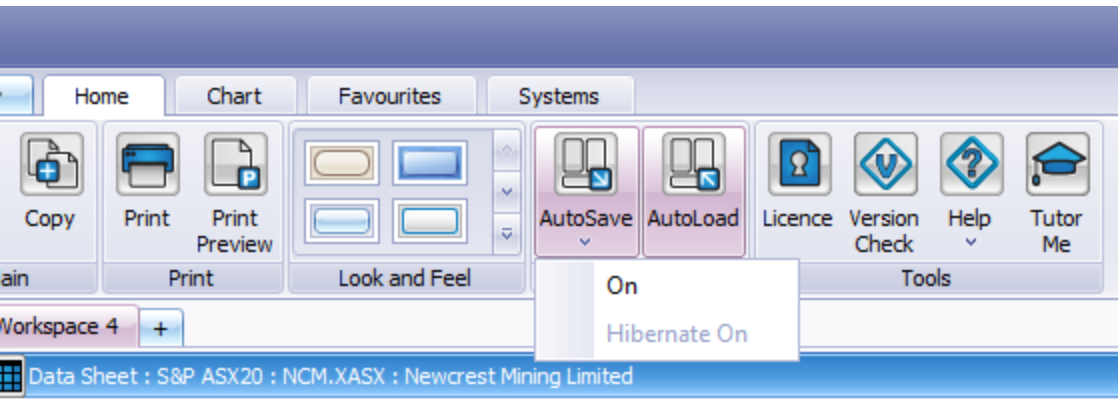
Fig.5.5

5.2.2 Loading Window Layouts

There are also two ways of loading the saved Window Layouts, either automatically on Beyond Charts start up or manually via the Workspace section of the Home tab.

5.2.2.1 Manual 'Load'

In the Workspace Manager of Beyond Charts, users can manually load their previously saved Window layouts by clicking Apply either via the right click menu or Workspace Manager menuas shown in Fig.5.6 .
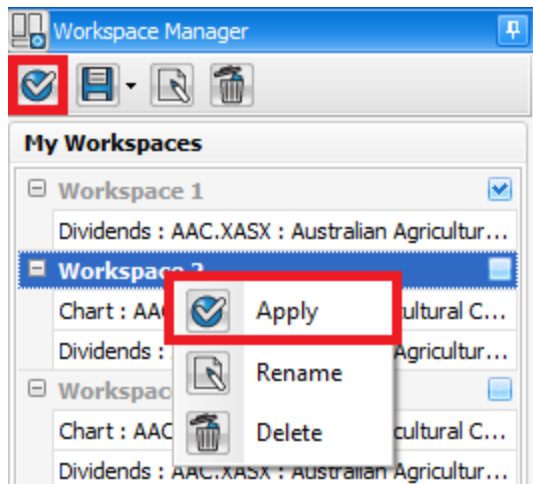
Fig.5.6

5.2.2.2 AutoLoad

By turning the AutoLoad option on in the Workspace section in the Home tab (as shown in Fig.5.7), Beyond Charts will automatically load the Window Layouts on start up. This, used in conjunction with the AutoSave option (covered above), allows Beyond Charts, to automatically save current settings and layout on exiting (without prompt) and automatically load them back on start up.

Fig.5.7

5.3 Hibernate on Close

Hibernate on Close allows users to 'pause' Beyond Charts without the need to save any unsaved work they may have on the charts into the Analyses Manager. This is best used in conjunction with the AutoSave and AutoLoad functions (Fig.5.8), so that on closing Beyond Charts, AutoSave saves everything, and on start-up AutoLoad loads everything. Saving and recalling any working-in-progress or unsaved analysis is the only difference between Hibernate on Close being on or off.

This shouldn't be used as a failsafe for saving the work user's wish to keep, as closing that chart and then closing Beyond Charts would lose that analysis, users should get into the habit of saving their analysis to the Analyses Manager and setting it as default if they wish it to load on the chart automatically.
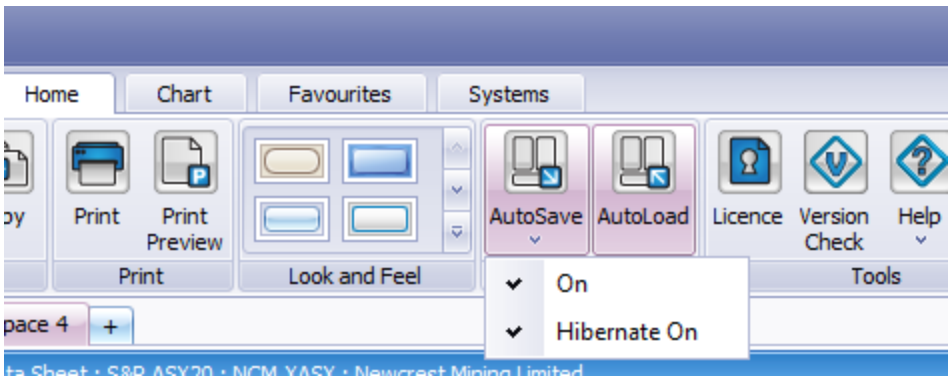
Fig.5.8

5.4 Working with Workspaces

We need to help the user understand what Workspace functionality is capable of. In this section include examples of Workspaces:
1. with multiple Watch Lists.
2. with multiple tiled indices or stocks such as ASX 20 in 2 separate tiled saved workspaces.
3. BCFL Scan

6

TECHNICAL ANALYSIS

The following topics are covered in this chapter:

- The RAD Chandelier

- Parameters

- Transitions

6.1 RAD Chandelier

6.1 Examples

The following scenarios show the different ways that the RAD Chandelier can be configured. In its simplest form it is just a single trailing stop based on price volatility. Advanced options have been supplied so that the indicator can be configured for many of the popular uses, such as including a break even transition.

6.1.1.1 Mode: Simple

In the following charts, the RAD Chandelier is shown functioning in Simple mode with two scenarios.

Firstly, with only a trailing stop component specified by the 'L1 Trailing Multiple'. The initial stop is effectively disabled by setting the multiple equal to or larger than the trailing. Secondly, with both an initial stop and trailing stop components.

Chart (top): ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ
Multiple = 6.0
Trailing Multiple = 6.0

tial Stop.
g Stop only.

Chart (bottom): ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ
Mutliple = 2.0
ailing Multiple = 6.0

Trailing Stop closer
than Initial Stop

6.1.1.2 Mode: Break Even

In the following charts, the RAD Chandelier is shown functioning in Break Even mode. Firstly, with the 'Initial Mode' set to Fixed and then Trailing.

In both scenarios, when the price component ('Level Trigger') exceeds the level specified by the 'Level 1 Multiple' the stop moves to using the 'Entry Price' and a trailing stop specified by the 'L1 Trailing Multiple' as components. The closest component is used.

: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

Mode = Fixed
Stop = 2.0
1 Multiple = 2.0
railing Multiple = 6.0

Level 1 crossed causes switch to
Break-even(Entry) price.

Trailing Stop closer

xed Initial stop

20/11/2012   27/11/2012   4/12/2012   11/12/2012   18/12/2012   27/12/2012   4/01/2013   11/01/2013   18/01/2013   25/01/2013   4/02/2013   11/02/2013

: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

Mode = Trailing
Stop = 2.0
1 Multiple = 2.0
ailing Multiple = 6.0

Level 1 crossed ca   switch to
Break-even(Entry) price.

Trailing Stop closer

iling Initial stop

20/11/2012   27/11/2012   4/12/2012   11/12/2012   18/12/2012   27/12/2012   4/01/2013   11/01/2013   18/01/2013   25/01/2013   4/02/2013   11/02/2013

6.1.1.3 Mode: Simple plus Additional Stops

In the following charts, the RAD Chandelier is shown functioning in Simple mode with two additional transitions levels. The additional transition levels allow the stop to be tightened when they are touched or crossed.

The RAD Chandelier starts with the standard Initial stop and a Trailing stop specified by the 'L1 Trailing Multiple'.

When the price component ('Level Trigger') exceeds the level specified by the 'Level 2 Multiple', the stop moves to using the trailing stop specified by the 'L2 Trailing Multiple'.

When the price component ('Level Trigger') exceeds the level specified by the 'Level 3 Multiple', the stop moves to using the trailing stop specified by the 'L3 Trailing Multiple'.

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6.1 RAD Chandelier

6.1 Examples

The following scenarios show the different ways that the RAD Chandelier can be configured. In its simplest form it is just a single trailing stop based on price volatility. Advanced options have been supplied so that the indicator can be configured for many of the popular uses, such as including a break even transition.

6.1.1.1 Mode: Simple

In the following charts, the RAD Chandelier is shown functioning in Simple mode with two scenarios.

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: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

l Multiple = 6.0
railing Multiple = 6.0

tial Stop.
g Stop only.

20/11/2012   27/11/2012   4/12/2012   11/12/2012   18/12/2012   27/12/2012   4/01/2013   11/01/2013   18/01/2013   25/01/2013   4/02/2013   11/02/2013

: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

Mutliple = 2.0
ailing Multiple = 6.0

Trailing Stop closer
than Initial Stop

20/11/2012   27/11/2012   4/12/2012   11/12/2012   18/12/2012   27/12/2012   4/01/2013   11/01/2013   18/01/2013   25/01/2013   4/02/2013   11/02/2013

6.1.1.2 Mode: Break Even

In the following charts, the RAD Chandelier is shown functioning in Break Even mode. Firstly, with the 'Initial Mode' set to Fixed and then Trailing.

In both scenarios, when the price component ('Level Trigger') exceeds the level specified by the 'Level 1 Multiple' the stop moves to using the 'Entry Price' and a trailing stop specified by the 'L1 Trailing Multiple' as components. The closest component is used.

: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

Mode = Fixed
Stop = 2.0
1 Multiple = 2.0
railing Multiple = 6.0

Level 1 crossed causes switch to
Break-even(Entry) price.

Trailing Stop closer

xed Initial stop

20/11/2012 27/11/2012 4/12/2012 11/12/2012 18/12/2012 27/12/2012 4/01/2013 11/01/2013 18/01/2013 25/01/2013 4/02/2013 11/02/2013

: ANZ.XASX : Australia and New Zealand Banking Group Limited

Chand 14 of ANZ

Mode = Trailing
Stop = 2.0
1 Multiple = 2.0
ailing Multiple = 6.0

Level 1 crossed ca   switch to
Break-even(Entry) price.

Trailing Stop closer

ling Initial stop

20/11/2012 27/11/2012 4/12/2012 11/12/2012 18/12/2012 27/12/2012 4/01/2013 11/01/2013 18/01/2013 25/01/2013 4/02/2013 11/02/2013

6.1.1.3 Mode: Simple plus Additional Stops

In the following charts, the RAD Chandelier is shown functioning in Simple mode with two additional transitions levels. The additional transition levels allow the stop to be tightened when they are touched or crossed.

The RAD Chandelier starts with the standard Initial stop and a Trailing stop specified by the 'L1 Trailing Multiple'.

When the price component ('Level Trigger') exceeds the level specified by the 'Level 2 Multiple', the stop moves to using the trailing stop specified by the 'L2 Trailing Multiple'.

When the price component ('Level Trigger') exceeds the level specified by the 'Level 3 Multiple', the stop moves to using the trailing stop specified by the 'L3 Trailing Multiple'.

6.2 Parameters

These are the parameters and options that are associated with the indicator.

Functions		
Direction	{Options}/Default	{'Long','Short'} / 'Long'
Mode	{Options}/Default	{'Simple'/'Break Even'} / 'Simple'
Additional Stops	{Options}/Default	{'Yes'/'No'} / 'No'
Parameters		
Period	min/max/default	1/999/14
Entry Price	min/max/default	0.0/99.0/0
Entry Date	"Entry Date"	Uses the PCs regional date format.
Initial Multiple	min/max/default	0.1/99.0/2
Initial Mode	{Options}/default	{'Fixed', 'Trailing'} / 'Fixed'
Level1 Multiple	min/max/default	0.0/99.0/2
1 Trailing Multiple	min/max/default	0.1/99.0/3.5
Level 2 Multiple	min/max/	0.0/99.0/0
2 Trailing Multiple	min/max/default	0.1/99.0/3.0
Level 3 Multiple	min/max/	0.0/99.0/0
3 Trailing Multiple	min/max/	0.1/99.0/2.5
Level Trigger	{Options}/default	{'Open', 'High' , 'Low', 'Close'} / 'Close',
Exit Trigger	{Options}/default	{'Open', 'High' , 'Low', 'Close'} / 'Low'
Stop Reference	{Options}/default	{'Open', 'High' , 'Low', 'Close'} / 'Close'

6.2.1 Using the parameters

In description below, the term "STOP" is used to refer to the actual final stop value shown on the chart after all the individual stop components have been evaluated. The components change at specified transition points and include; Initial Stop, Entry Price and various Trailing Stops.

Period: ATR look back period in bars.

Entry Price: The price at which the trade was entered. Set as zero (0) to use the 'Stop Reference' price.

Entry Date: The date at which the trade was entered. This must be a date for a bar that exists within the range of the chart Period.

Level Trigger: The bar price, OHLC, used to determine when a Level condition has been met.

Stop Reference: The bar price, OHLC, used as a reference point when calculating the value of stop components. eg; Trailing Stop = Stop Reference - (Multiple * ATR)

Exit Trigger: The bar price, OHLC, used to determine when an Exit condition has been met.

Initial Multiple: The ATR multiple used to calculate the Initial Stop as one of the components in the STOP calculation.

- The Initial Stop is calculated from the "Stop Reference Price".
- To effectively disable the Initial Stop, set the multiple to 99 (ie. A large value).

Initial Mode: Turns the Initial Fixed Stop into a Trailing stop, that uses the "Initial Multiple", from and including the "Entry Date".

- The Initial Mode is only available when the Mode is set to Break Even.
- If "Initial Mode" is set to 'Fixed':
    - The Initial Stop after the Entry bar shall be equal to the previous STOP value.
- If "Initial Mode" is set to 'Trailing':
    - The Initial Stop shall be calculated every day; as a Trailing Stop.
    - The Initial Stop and therefore STOP shall never be closer than the Entry Price.
- The STOP price for the current bar shall never be further away than the previous bar.

Level 1 Multiple: The ATR multiple used to calculate the Level 1 price (break-even transition level), at which the STOP calculation includes the Break-even component.

- The Level 1 price is calculated from the "Entry Price" at the "Entry Date".
- When set as zero (disabled), the break even function is disabled and the STOP is effectively operating in SIMPLE mode.
    - The STOP calculation uses the Initial Stop AND the Trailing stop, that uses the "L1 Trailing Multiple" as components, immediately from and including "Entry Date".
- When set greater than zero (enabled), the break-even component is enabled and the STOP is operating in Break Even mode.
    - The STOP calculation uses the Initial Stop as a component, immediately from and including the "Entry Date".
    - When the Level 1 price is touched or crossed by the "Level Trigger", the STOP calculation switches to using the break-even

"Entry Price" AND the Trailing stop, that uses the "L1 Trailing Multiple" as components.

Level 2 Multiple: The ATR multiple used to calculate the Level 2 price.

- When the Level 2 price is touched or crossed by the "Level Trigger", the STOP calculation switches to using ONLY the Trailing stop that uses the "L2 Trailing Multiple" as a component.
- This should be greater than the "Level 1 Multiple".
- The Level 2 price is calculated from the "Entry Price" at the "Entry Date"
- Set as zero (0) to disable.

Level 3 Multiple: The ATR multiple used to calculate the Level 3 price.

- When the Level 3 price is touched or crossed by the "Level Trigger", the STOP Calculation switches to using ONLY the Trailing stop that uses the "L3 Trailing Multiple" as a component.
- This should be greater than the "Level 2 Multiple".
- The Level 3 price is calculated from the "Entry Price" at the "Entry Date".
- Set as zero (0) to disable.

L1 Trailing Multiple: The ATR multiple used to calculate the trailing stop associated with Level 1 Multiple or when operating in Simple Mode.

L2 Trailing Multiple: The ATR multiple used to calculate the trailing stop associated with Level 2 Multiple.

L3 Trailing Multiple: The ATR multiple used to calculate the trailing stop associated with Level 3 Multiple.

If a Trailing stop or Level calculation produces a negative price, it will return a zero(0) value as the result.

6.3 Transitions

The transition from the one set of STOP components to another set shall occur as soon as the conditions for triggering Level 1, 2 or 3 prices are met, if they are enabled.

- Triggering Level 3 takes precedence over Level 2 and Level 2 takes precedence over Level 1.
- Once a higher Level has been triggered, a lower level can never be re-triggered.
- If multiple Levels conditions are met during one bar, the precedence above will be adhered to.
- A change of STOP components shall occur immediately, on that bar.

6.3.1 For long trades:

- Trailing Stops, when used, are calculated every day using the 'Stop Reference' price as a reference.
- The STOP price for the current bar shall never be less than the previous bar.
- If the STOP price calculated is less than the previous STOP price, the previous STOP price is retained.

6.3.2 For short trades:

- Trailing Stops, when used, are calculated every day using the 'Stop Reference' price as a reference.
- The STOP price for the current bar shall never be more than the previous bar.
- If the STOP price calculated is more than the previous STOP price, the previous STOP price is retained.

6.3.3 Exits:

- Checking for an exit cross takes priority over all other checks.
- Exit checks are only done after the "Entry Date".
- If the "Exit Trigger" touches or crosses the STOP, the trade has been considered closed.
- Once closed, the STOP will continue to be drawn across the screen at the same price.

6.4 Acknowledgement

This version of the RAD Chandelier is adapted from original concept developed by Richard Dale of Norgate Investor Services - www.premiumdata.net and reproduced with permission.

6

ADDITIONAL READING

Technical Analysis

- Bedford, Louise. Charting Secrets. Wrightbooks (Wiley), 2004
- Murphy, John J. Technical Analysis of the Financial Markets. NYIF, 1999.
- Murphy, John J. The Visual Investor, Wiley. 1996.
- Pring, Martin. Technical Analysis Explained Edition 3. McGraw Hill, 1991.
- Weinstein, Stan. Secrets for profiting in Bull and Bear Markets. McGraw Hill, 1988.

6 ADDITIONAL READING