

What is Ticker Toolkit™?


Ticker Toolkit™ is stock analysis software that simplifies the homework and research required to make informed stock investment decisions. It is designed for the entry-level or experienced do-it-yourself investor who evaluates stocks based on their fundamental metrics. While it can complement the tools required by the day-trader or technical, chart-based trader, Ticker Toolkit™ is ideally suited to the busy professional who wants to 'know what they own' and 'own what they know' but who does not have time to actively trade during the business day and who is investing for the long term.

What can I do with Ticker Toolkit™?


Ticker Toolkit™ allows you to organize your stock investment research in your own personalized workbook. It retrieves fundamental stock quote information from the data source of your choice (including free information sources) and displays the data in an easily readable format that is color-coded according to your own stock evaluation thresholds. You choose your preferred stock categories (brokerage and retirement accounts, watch-list themes and industry sectors) and create a custom stock workbook to organize your stock investment homework, thoughts and ideas.

For each stock in your workbook, you can capture notes, specify price targets and track gains and losses. A powerful built-in search engine lets you define and save custom searches that find the stocks in your workbook that match your selection criteria and evaluation thresholds.

Ticker Toolkit™ Features and Capabilities

 Create a workbook of stock datasheets organized by your own defined categories and color-coded according to your own stock evaluation thresholds.

My Account		Control Panel		4/12/2015 8:26:11 PM													
Account Sheet		Show Price Targets	Show \$	Show Cap	Show Div Pay Dates	Show P/S											
Update		Δ% Share Price	Last Share Price	Annual Dividend Yield (%)	Price / Earnings (P/E)	Price/Earnings / Growth (PEG)	Earnings per Share (EPS)	52-Week Low	52-Week High	Bid	Ask	50-day moving average	200-day moving average	Price / Book Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Notes
Hyperlink	Yahoo Finance	1.8%		1.3%	6.9	1.6								4.5	26.4	3.2%	
FB	Facebook Inc.	-0.2%	\$ 82.04	0.0%	73.9	1.4	\$1.11	\$54.66	\$86.07	\$82.01	\$82.10	\$80.94	\$77.66	6.3	31.9	0.0%	
GE	General Electric C	10.8%	\$ 28.51	3.2%	19.0	2.2	\$1.50	\$23.41	\$28.68	\$28.54	\$28.56	\$25.44	\$25.29	2.2	15.8	61.3%	
GS	Goldman Sachs Group	0.4%	\$ 195.64	1.2%	11.5	1.5	\$17.07	\$153.10	\$198.06	\$195.45	\$195.66	\$190.45	\$187.21	1.2	10.6	14.1%	
TGT	Target Corporation	0.3%	\$ 83.57	2.5%	(32.8)	1.5	(\$2.55)	\$55.25	\$83.74	\$83.18	\$84.00	\$79.97	\$72.40	3.8	16.7	-81.6%	
TWTR	Twitter Inc. Common	-0.4%	\$ 51.94	0.0%	(54.1)	1.8	(\$0.96)	\$29.51	\$55.99	\$51.85	\$51.93	\$48.87	\$44.21	9.1	64.1	0.0%	
DIS	Walt Disney Company	0.2%	\$ 106.95	1.1%	23.8	1.5	\$4.50	\$76.31	\$108.94	\$106.85	\$106.99	\$105.79	\$95.65	4.1	19.3	25.6%	

 Specify lower and upper price targets that can be included in your stock selection criteria. If the same stock appears on multiple datasheets in your workbook, enter and edit price targets on any datasheet where that stock appears. Price targets automatically synchronize across datasheets.

Account Sheet		Hide Price Targets	
Update		Lower Price Target	Upper Price Target
Symbol	Name		
Hyperlink	Yahoo Finance		
FB	Facebook Inc.	\$ 70.00	\$ 90.00
GE	General Electric C	\$ 23.00	\$ 29.00
GS	Goldman Sachs Group	\$ 175.00	\$ 195.00
TGT	Target Corporation	\$ 65.00	\$ 85.00
TWTR	Twitter Inc. Common	\$ 40.00	\$ 70.00

The Deluxe Edition is capable of performing user-defined stock searches based on multiple selection criteria, including price targets.

The Basic Edition allows you to record price targets, but does not include the Ticker Toolkit™ stock search engine.

For more information about Ticker Toolkit™ and to download your free trial, visit <http://www.tickertoolkit.com>.



Record notes for each stock.

If the same stock appears on multiple datasheets in your workbook, enter and edit stock notes on any datasheet where that stock appears. Notes automatically synchronize across datasheets.

BAC	Bank of America C	#2 - Upgraded from #1 8/22/14; raised upper PT from 17 8/22/14
BWP	Boardwalk Pipelin	Added position 7/18/14; possible KMI takeover
BA	Boeing Company (T	Downgraded from #1 on 8/29/14; Added position on 04/21/14
CELG	Celgene Corporati	New drug in pipeline



Expand your research beyond Ticker Toolkit™ by clicking on hyperlinks that you customize according to your own trusted information and news sources.

The screenshot shows the Yahoo Finance website interface. A search bar at the top contains 'Facebook Inc.' and a red arrow points to the 'Look Up' button. Below the search bar, the website displays the stock price for Facebook, Inc. (FB) at \$82.04, up 0.13 (0.16%) as of April 10, 4:00 PM EDT. The page also includes a 'More On FB' section and various market data indicators like Dow and Nasdaq indices.



Track the performance of stock portfolios that you own or create and monitor the performance of experimental portfolios for fun and education .

Update		Δ% Share	Last Share	Hide Share Quantities & Values			
Symbol	Name	Price	Price	Share Qty	\$ Value	Day Change	% of Total
Hyperlink	Yahoo Finance	1.8%			\$ 43,755.50	\$589.50	
FB	Facebook Inc.	-0.2%	\$ 82.04	100.0000	\$ 8,204.00	(\$13.00)	18.7%
GE	General Electric C	10.8%	\$ 28.51	200.0000	\$ 5,702.00	\$556.00	13.0%
GS	Goldman Sachs Grou	0.4%	\$ 195.64	50.0000	\$ 9,782.00	\$37.50	22.4%
TGT	Target Corporation	0.3%	\$ 83.57	50.0000	\$ 4,178.50	\$14.00	9.5%
TWTR	Twitter Inc. Commo	-0.4%	\$ 51.94	100.0000	\$ 5,194.00	(\$23.00)	11.9%
DIS	Walt Disney Compan	0.2%	\$ 106.95	100.0000	\$ 10,695.00	\$18.00	24.4%



Program user-definable search buttons that activate the powerful Ticker Toolkit™ search engine to easily find stocks that match your selection criteria and evaluation thresholds.

User-Programmable Stock Selection Presets		
Preset 1	Preset 5	Preset 9
Preset 2	Preset 6	Preset 10
Preset 3	Preset 7	Preset 11
Preset 4	Preset 8	Preset 12

Deluxe Edition only

For more information about Ticker Toolkit™ and to download your free trial, visit <http://www.tickertoolkit.com>.