Getting Started with Ticker Toolkit™

Thank you for choosing Ticker Toolkit[™]. This guide will walk you through each of the features and capabilities offered by Ticker Toolkit[™] Basic Edition (TTK Basic) and Ticker Toolkit[™] Deluxe Edition (TTK Deluxe). Each lesson in the following pages indicates the applicable edition. A notation of "Deluxe Only" indicates that the feature is available in TTK Deluxe and not in TTK Basic. A notation of "All Editions" indicates that the feature is available in all Ticker Toolkit[™] editions.

As you practice these lessons with your copy of Ticker Toolkit[™], use the built-in Help when you need further explanation of a feature or concept. Click on the



button on the TTK Deluxe Control Panel or the



button on each datasheet whenever you need help.

About Ticker Toolkit™

Ticker Toolkit[™] is stock analysis software that simplifies the research and homework required to make informed stock investment decisions. Using Ticker Toolkit[™], you will create and maintain a stock investment workbook. Your personalized workbook keeps you organized with datasheets that you create, stocks that you select and metrics that are color-coded according to your own evaluation thresholds. Run customized reports, capture notes, set price targets and quickly visualize your data to 'know what you own' and 'own what you know.'

Ticker Toolkit[™] is designed for the do-it-yourself stock investor who wants a fully-functional stock analysis tool that

- Is Inexpensive
- Is easily customized
- Is free from annoying pop-up ads
- Is independent of any brokerage firm or analyst
- Maintains the privacy of your stock research, including price targets and watch lists

Lesson 1: Ticker Toolkit[™] Control Panel (All Editions)

Ticke	r Toolkit™ De	eluxe Editio	n Conti	rol Pan	el			Ticker Toolkit™ Basic Edition Control Panel
	· · · · ·	Select Stocks from	Find Symbo	ol / Name	Iser-Programmable Stock Se	lection Presets	Duran 0	Basic Control Panel
N	Datasheets	Select Stocks from Account Sheets	Go To S	Sheet	Preset 2	Preset 6	Preset 9 Preset 10	Evaluation Thresholds
Ticker Tool	kit™	Select Stocks from Sector Sheets	Show P Program	reset nming	Preset 3	Preset 7	Preset 11	Lower Upper
	🕜 Help	Deluxe Edition Select Stocks from All Sheets Select Stocks from Sector Sheets Select Stocks from Specified Sheets Ction Criteria A Preset3 S0 Day © 200 Day © Doer © Pos/Neg © Pos/Neg © Doer © Pos/Neg © Pos/Neg © Doer © Pos/Neg	Program Preset	Clear Preset	Preset 4	Preset 8	Preset 12	Price / Earnings 1.0 1.0 Proximity Tolerance 2.0%
	A Selection	on Criteria		Selection	n	B Selection Crite	ria	Yield 0.0% - 0.0% -
Price	A Preset1 A Preset2 A P Change 💌 50 Da	reset 3	Clear A	Logic	Price Cha	1 B Preset 2 B Preset 3	Clear B	Page Layout Formulas Nat Div / Earnings 0% - 0% -
Yield	Lower 💌 Upper			СВ	Yield	ver 💌 Upper 💌		PEG 1.0 + 1.0 + Reset Thresholds
P/E Fwd P/E	Lower Upper	Pos/Neg	Pos/Neg 💌	C A Or B	P/E Lon	ver Vupper Vupper V	Pos/Neg PE Pos/Neg	Show Price Targets Show Price / Book 1.0 + 1.0 +
Div/E	Lower 💌 Upper	Pos/Neg		C A, Not B	Div/E Low	ver 💌 Upper 💌 I	Pos/Neg	Annu Price / Sales 1.0 - Save Default Thresholds
EPS PEG	Pos/Neg			C B, Not A	EPS Pos/	Neg 💌		A% Share Last Share Divide Price Price Yield Display Settings
P/Book	Lower Upper	Pos/Neg		C Not B	P/Book Low	ver Ver Upper	Pos/Neg	0.0% Sheet Visibility
P/Sales	Lower 💽 Upper	Pos/Neg 💌		C Not A, Not B	P/Sales Low	ver Vpper V	Pos/Neg	Edit Hyperlinks Menu
мкт Сар	Lower Upper				MKt Cap Lov	ver 💽 📔 Upper 💽		I Always show Share Quantities

Ticker Toolkit[™] Deluxe Edition (TTK Deluxe) opens to the Control Panel where you will personalize Ticker Toolkit[™] based on your analysis style/methods, your investment goals and your risk tolerance. Click on the 'Control Panel' button to open the Control Panel in the Ticker Toolkit[™] Basic Edition (TTK Basic). Since Ticker Toolkit[™] is running within Microsoft Excel, you will see the Excel menu ribbon at the top of your screen. Ignore the Excel menus for now.

Lesson 2: Open Example Ticker Toolkit[™] Deluxe Edition Control Panel Ticker Toolkit[™] Basic Edition Control Panel Workbook Display Settings (All Editions) Select Stocks from Show Preset Sheet Visibility Preset 3 Ticker Toolkit™ Sector Sheets Programming Always show Price Tar Select Stocks from Program Clear Preset 4 Edit Hyperlinks Menu About Help Specifed Sheets Preset Preset Always show Share Qu ✓ Release Notes Price/Book 1.0 1.0 Sort Data By Reset toggled columns 1.0 F Price Targets Price/Sales 1.0 Stock Name C Stock Ticker Symbol User Notes Real-time Threshold re **Display Settings** Sheet Visibility ✓ Account Sheets Maintenance Operations Planning Sheets Hyperlink None Edit Menu Sector Sheets Full Restore Sort Data By Stock Name O Stock Ticker Symbol Full Backup Clear Price Targets Clear Notes About Price Target Always show Price Targets Release Notes Selection C Always show Share Quantities Miscellaneous Setting Confirm Note changes 2 Set Data Folder Maintenance Operations Confirm Price Target chang Workbook Operat Datasheet Operation # Query Retries Show greeting at startup Set Query Add-in Retry Query if Backup Sheet Edit Properties ☑ On Save, prompt to create Full Backup Add New Sheet missing data Full Restore Delete Sheet Restore Sheets Ticker Toolkit™ Close **Miscellaneous Settings**

Ticker Toolkit[™] installs example workbook files to provide you with a starting point for your own Ticker Toolkit[™] workbook. Scroll down in the Control Panel to the 'Maintenance Operations' section and click 'Full Restore' to import one of these workbook examples.

Price/Book 1.0 1.0 1.0 Price/Sales 1.0	Confirm Full Restore	Ŋ
Display Settings Hyperlink None Edit Menu Sort Data By Stock Name Stock Symbol Always Show Price Targets Always Show Share Quantities	 WARNING - This operation will replace the datasheets and settings in the currently open workbook with those from a backup file. If you are restoring a saved workbook to a new installation of Ticker Toolkit" or you do not want to retain the currently open workbook, you can ignore this warning. If you do wish to retain any part of the currently open workbook, you may want to first perform a 'Full Backup.' Do you want to continue with this 'Full Restore' operation? Click 'No' to cancel or 'Yes' to proceed with the Full Restore. 	Data Sheet Zoom Level
Maintenance Operations		
Workbook Operations Datasheet Operations Full Backup Add New Sheet Backup	ack	Clear Presets
Full Restore Delete Sheet Res	store Sheets Clear All Settings	Clear Notes

The Ticker Toolkit[™] 'Full Restore' operation erases all settings and datasheets in the currently open workbook before importing the settings and datasheets from the designated backup file to be restored. Click 'Yes' to confirm erasure of the Ticker Toolkit[™] settings and datasheets.

Lesson 4: Open Example Workbook (Continued) (All Editions)

Price/Book 1.0 + 1.0	Select backup file to restore	e			X
Price/Sales 1.0 - 1.0	Co v k w Document	ts My Documents Ticker Toolkit	Examples 🕨 👻 🍕	Search Examples	٩
Display Settings	Organize New folder Microsoft Excel	r Documents library		BEE Arrange by:	▼ 🗍 🔞
Hyperlink None Sort Data By Stock Name Stoc Always Show Price Ta Always Show Share O Maintenance Operations Workbook Operations Full Backup	 ★ Favorites ■ Desktop ▲ Downloads ※ Recent Places ⇒ Libraries > Documents → Music ■ Pictures 	Examples Name Query Addin Examples	Date modified 10/14/2014 3:55 PM 10/14/2014 4:00 PM	Type File folder File folder	Size
Full Restore Miscellaneous Settings	File na	me	▼ Tools ▼	Ticker Toolkit™ Open	Cancel

Navigate to the 'Workbook Examples' folder located in the 'Ticker Toolkit->Examples' directory. Open the 'Workbook Examples' folder.

Price/Book1.01.0Price/Sales1.01.0	Select backup file to restore	es 🕨 Workbook Examples	✓ 4y Search Workbool	: Examples
Display Settings Hyperlink None Sort Data By Stock Name Stock Always Show Price T Always Show Share (Maintenance Operations Full Backup Full Backup	Organize New folder Microsoft Excel Favorites Desktop Downloads Recent Places Libraries Documents Music Pictures Videos	nts library amples Date moc ensive workbook example.ttk 9/17/2014 orkbook example.ttk 9/17/2014	8≡ Arrange b dified Type 111:56 AM TTK File 111:56 AM TTK File	y: Folder Size 11 KB 5 KB
Miscellaneous Settings	File name:		Ticker Toolkit™ Tools Open	Cancel

Ticker Toolkit[™] installation places two examples in the 'Workbook Examples' folder. The 'simple workbook example' provides a single, empty stock datasheet to record your stock entries. The 'comprehensive workbook example' provides multiple 'sector' datasheets pre-populated with example stocks, along with two blank datasheets for your own stock entries. Select the 'simple workbook example' for this lesson. Note that the 'comprehensive workbook example' can only be restored in TTK Deluxe, since it contains multiple datasheets and TTK Basic supports only a single datasheet.

Lesson 6: Open Example Workbook (Continued) (All Editions)

Comple	ed Full Restore of Settings and Datasheets	x
Ticker While You w from t	Toolkit [™] has restored your settings and datasheets. your stock symbols have been restored, no stock data was retai ill need to click an 'Update' button to update your stock data the data source specified in the query add-in file.	ned.
		ок

When Ticker Toolkit[™] restores settings and datasheets, the datasheets are restored with only the data that you entered (including stock symbols) and none of the data retrieved from your selected stock data source. You will need to update the datasheets from your selected stock data source as we'll see in Lesson 18.

Lesson 7: Stock Selection Presets (Deluxe Only)

	1	Select Stocks from	-	1	User-Programmable Stock Select	ion Presets	
and a	Update All	All Sheets	Find Symb	ol / Name	Growth or Yield	Preset 5	Top Winners
Ticker Toolkit™	Datasheets	Select Stocks from Account Sheets	Go To Sheet		Growth or Yield - Low PBook	Growth or Yield - Below Averages	Top Losers
		Select Stocks from Sector Sheets	Show I Program	Preset mming	Preset 3	At or Below Lower Price Target	Wild Bid/Ask
	🕜 Help	Select Stocks from Specifed Sheets	Program Preset	Clear Preset	Growth or Yield - Below Avgs / Uptick	At or Above Upper Price Target	Below Averages

The example workbook that you restored includes pre-configured Stock Selection Preset buttons (Presets). Note that 'Preset 3' and 'Preset 5' buttons have not yet been configured. You will be able to customize all of the programmable Presets to your own liking. Stock Selection Presets will likely become your most commonly used mechanism to search for stocks that meet your selection criteria. We'll review a brief Preset programming example in Lesson 27.



In order to view the programmed configuration of each Preset, click the 'Show Preset Programming' button and then the Preset that you wish to view. The Preset programming will be displayed in the A and B Selection Criteria with the selection logical operator showing how the A and B Selection Criteria are combined in your search. Additionally, the datasheet scope will be displayed showing which datasheets will be included in the programmed search. Note that Presets store only Selection Criteria, Selection Logic and search scope – they do NOT store Evaluation Thresholds. Once a Preset button is programmed, you will be able to adjust Evaluation Thresholds (as shown in Lesson 9) at any time prior to clicking one of your programmed Preset buttons.

Lesson 9: Evaluation Thresholds (All Editions, with exceptions noted)

Ticker Toolkit[™] Deluxe Edition Control Panel

Evaluation	Threshold	ls		
_	Lower	Upper		
Price/Earnings	12.0	17.0	Min Price Change 1.0%	Reset Thresholds
Yield	4.0%	10.0%		Save Default Thresholds
Div/Earnings	40%	80%	Proximity Tolerance 2.0%	
PEG	1.0	2.0		
Price/Book	1.0	2.0		
Price/Sales	1.0	2.0		

Ticker Toolkit[™] Basic Edition Control Panel

	0103		
	Lower	Upper	
Price / Earnings	12.0 🔺	17.0 +	Proximity Tolerance 2.0%
Yield	4.0%	10.0%	
Div / Earnings	40%	80% +	
PEG	1.0	2.0	Reset Thresholds
Dalas (Daala	1.0	2.0	

Scroll down in the Control Panel to view the Evaluation Thresholds. These thresholds are used to color-code values on each datasheet and, in TTK Deluxe, they are combined with the Selection Criteria to completely define your stock selection rules. The example workbook that you restored includes sample evaluation thresholds. You can adjust each threshold using its spin-button (up/down arrow) or by manually entering the threshold in each cell. You will adjust the thresholds to define your 'fair value' range which is suited to your own stock valuation preferences and risk tolerance. Click 'Save Default Thresholds' to save the configured thresholds as your own default values and click 'Reset Thresholds' to restore your saved defaults. You can always restore your personalized default thresholds by clicking the 'Reset Thresholds' button. This permits you to freely experiment with new evaluation thresholds knowing that a simple click of the 'Reset Thresholds' button will return you to your own default thresholds.

Lesson 10: Display Settings (All Editions, with exceptions noted)



The example workbook that you restored includes preconfigured hyperlinks that you will be able to customize based on your preferred stock information/news sources. Click the Hyperlink pull-down menu to see the available hyperlinks that are configured in the example workbook. TTK Deluxe includes this Hyperlinks pull-down menu on the Control Panel and each Datasheet. TTK Basic includes this Hyperlinks pull-down on the datasheet only.

Lesson 11: Select Hyperlink (All Editions)

Hyperlinks pull-down menu on the Ticker Toolkit™ Deluxe Edition Control Panel



Hyperlinks pull-down menu on each Datasheet (including TTK Basic Datasheet)

	Update	A% Share	Last Share		
Symbol	Name	Price	Price		
Hyperlink	Yahoo Finance 🛛 🔽	0.0%			
	None Motley Fool				
	Yahoo Finance Google Finance Zacks The Street Yahoo Finance Quote Hist Schwab Market Edge Ticker Toolkit Website Ticker Toolkit Website				

When you click the Hyperlink pull-down menu, you will see a menu of available hyperlinks that you have customized (hyperlink customization is described in Lesson 15). Your selected hyperlink will direct you to one of your preferred information/news sources for each stock in your Ticker Toolkit[™] workbook. The custom hyperlink feature will become much clearer to you after we review the stock datasheet beginning with Lesson 16. You will frequently find yourself clicking on a stock's hyperlink to get more information after its fundamentals have piqued your interest. See the on-line help (on the Ticker Toolkit[™] website) for detailed instructions and examples for configuring your custom hyperlinks (<u>http://www.tickertoolkit.com/help/online-help-library</u>).

Lesson 12: Maintenance Operations (All Editions, with exceptions noted) Ticker Toolkit[™] Deluxe Edition Control Panel

Maintenance Operations		
Workbook Operations	C Datasheet Operations	-
Full Backup	Add New Sheet	Backup She
Full Restore	Delete Sheet	Restore She

tenance Operat	tions		_
		-	
1		1	

Scroll down in the Control Panel to the 'Maintenance Operations' section. Here you can backup and restore the user-entered data for a single datasheet (Deluxe Only) or the settings and datasheets for an entire Ticker Toolkit[™] workbook (e.g. the example workbook that you restored for this lesson). The backup file can be shared with other Ticker Toolkit[™] users (to share stock portfolios or stock watch lists). The full backup is also useful when migrating to a new version of Ticker Toolkit[™]. It is here, too, that you can add/delete new datasheets to/from your Ticker Toolkit[™] workbook (Deluxe Only).

Typically, you will save your Ticker Toolkit[™] workbook using Excel's File->Save mechanism and use the Ticker Toolkit[™] maintenance operations for transferring Ticker Toolkit[™] data and for creating emergency recovery backup files. It is a good idea to periodically create backup files using the Ticker Toolkit[™] 'Full Backup' operation in case you need to recover a corrupt Excel workbook. With a Ticker Toolkit[™] Full Backup file, you can always recover your workbook by restoring the backup in the same way that you restored the example workbook for this lesson.

Lesson 13: Miscellaneous Settings (All Editions)



Scroll down in the Control Panel to the 'Miscellaneous Settings' section. Here, you can control certain behavioral aspects of Ticker Toolkit[™], including the number of times that Ticker Toolkit[™] retries a failed stock data update query. If you're using Ticker Toolkit[™] with an especially poor/slow network connection, you may need to increase the number of automatic query retries. If your updated datasheets frequently contain columns of data that are not available ('N/A'), you can try checking the 'Retry Query if missing data' checkbox. Note that enabling the option to 'Retry Query if missing data' may significantly slow-down data updates, since Ticker Toolkit[™] may make more Query attempts. The Miscellaneous Settings also include your data folder for Ticker Toolkit[™] backup files.

Lesson 14: Set Backup Data Folder (All Editions)



Click 'Set Data Folder' in the 'Miscellaneous Settings' section to specify the folder for the backup files that you will create. These backup files are different from the Excel workbook that you will save after each working session (by clicking File->Save). It is a good idea to create regular Ticker Toolkit[™] 'Full Backups' for easy recovery from possible Excel workbook corruption and for use when you're upgrading to a new version of Ticker Toolkit[™].

Ticker Toolkit™ De	luxe Edition Cont	rol Panel		Ticker Toolkit™ Ba	asic Editior	n Control Par	ne
Ticker Toolkit™	Sector Sheets	Hyperlink Name	Hyperink URL	Div / Earnings 40% 📥		Hyperlink Name	
🥑 Help	Select Stocks from Specifed Sheets Menu Item #1	Motley Fool	http://caps.fool.com/ticker/%symbol%.aspx	PEG 1.0 +	Menu Item #1	Motley Fool	ſ
PEG 1.0 2.0	Menu Item #2	Yahoo Finance	http://finance.yahoo.com/q?s=%symbol%	Price / Book	Menu Item #2	Yahoo Finance	ſ
Price/Book 1.0 ★ 2.0 Price/Sales 1.0 ★ 2.0	Menu Item #3	Google Finance	http://www.google.com/finance?g=%symbol%	Price / Sales	Menu Item #3	Google Finance	ſ
	Menu Item #4	Zacks	http://www.zacks.com/stock/quote/%symbo%	Display Settings	Menu Item #4	Zacks	Î
Display Settings	Menu Item #5	The Street	http://www.thestreet.com/quote/%symbol%.html	Edit Hyperlinks Menu	Menu Item #5	The Street	Î
Hyperlink Yahoo Finance	Edit Menu Menu Item #6	Yahoo Finance Quote Histor	http://finance.yahoo.com/q/hp?s=%symbol%	Sort Data By	Menu Item #6	Yahoo Finance Quote Histor	ſ
Sort Data By Stock Name Stock	Ticker Symbol Menu Item #7	Schwab Market Edge	https://schwabweekly.marketedge.com/secop/%symbol%.asp?p=SC	Stock Name Stock Ticker Symbol	Menu Item #7	Schwab Market Edge	Î
T Always show Share Qu	antities Menu Item #8	Ticker Toolkt	http://www.tickertookit.com		Menu Item #8	Ticker Toolkit Website	Í
Maintenance Operations	Menu Item #9	Ticker Tookt	http://www.tickertoolkit.com	Maintenance Operations	Menu Item #9	Ticker Toolkit Website	ſ
Workbook Operations	Add New Sheet	perinks Menu	User-Defined Default Hyperlinks Menu	Full Backup Full Restore	Current Hyperlink	s Menu	1

Scroll up in the Control Panel to the 'Display Settings' section and click on 'Edit Menu.' Here, you can customize news/information hyperlinks that appear in the hyperlink menu that we reviewed in Lesson 11. Give each hyperlink a name (in the 'Hyperlink Name' column) and specify the URL in the 'Hyperlink URL' column. The example workbook you restored includes examples from which you can learn the URL format. Specify %symbol% where the URL needs the stock ticker symbol. Click 'Save Default Hyperlinks' to save your configured hyperlinks as defaults. Click 'Reset Hyperlinks' to restore your own default hyperlinks. See the on-line help (on the Ticker Toolkit™ website) for detailed instructions and examples for configuring your custom hyperlinks (http://www.tickertoolkit.com/help/online-help-library).

Му Ассо	ount	64	Contro	ol Panel														
Account	Sheet 🕜		Show Pri	ce Targets	Show \$			Show Cap	Show Div	Pay Dates					Show P/S			
Symbol	Update Name		∆% 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	•	0.0%		0.0%	0.0	0.0								0.0	0.0	0.0%	
4 + 1	Control Pane	M	y Account	About / F	Release Notes	102/						d.	Li di					

Lesson 16: Ticker Toolkit[™] Datasheets (All Editions)

Stock Datasheets are the building blocks for a Ticker Toolkit[™] workbook. Each datasheet can hold up to 193 ticker symbols. Depending on your Ticker Toolkit[™] product, you will be able to create one (Basic Edition) or more (Deluxe Edition) stock datasheets, each with a different theme/purpose in your workbook. The example workbook that you restored includes a datasheet named 'My Account.' Click on the 'My Account' tab at the bottom of the window to view the 'My Account' datasheet.

Lesson 17: Enter Stock Symbols (All Editions)

My Accou	int	Contro	ol Panel		Changed					
Account Sh	neet 🕜	Show Pr	ice Targets	Show \$			Show Cap	Show Div	Pay Dates	
Symbol	Update Name	∆% 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
Hyperlink	Yahoo Finance 🖉 💌	0.0%	1	0.0%	0.0	0.0				(
FB										
GE										
DIS										
TWTR										
TGT										
GS										

Enter each stock symbol in an available empty cell in the Symbol column. The case, order and location of entry does not matter, as long as you're placing your entry in an empty cell in the Symbol column. Note that in rare instances, analysts, brokerage firms and stock information sources may use slightly different symbols for the same stock (e.g. Yahoo Finance uses 'RDS-B' for 'Royal Dutch Shell B Shares' while Schwab uses 'RDSB'). Be sure to enter the symbol as expected by your stock data source (Yahoo Finance in this example). Most often, the ticker symbol is consistent across stock data sources.

	ount	Contro	ol Panel	4/12/2015	8:26:11 PM												
Account	Sheet 🕜	Show Pri	ice Targets	Show \$			Show Cap	Show Div	Pay Dates					Show P/S			
	Update	∆% Share	Last Share	Annual Dividend	Price / Earnings	Price/ Earnings / Growth	Earnings per Share	52-Week	52-Week			50-day moving	200-day moving	Price / Book	Fwd P/E @ next yr's est	Annual Dividend/	
Symbol	Name	Price	Price	Yield (%)	(P/E)	(PEG)	(EPS)	Low	High	Bid	Ask	average	average	Ratio	earnings	Earnings	Note
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	<mark>61.3</mark> %	
GS	Goldman Sachs Grou	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. Commo	-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 Compan	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%	

When you click the 'Update' button on a datasheet, Ticker Toolkit[™] retrieves stock quote data for the ticker symbols you specified. The stock quote data is color-coded for easy readability, according to the Evaluation Thresholds that you specified on the Control Panel. Review the datasheet to become familiar with the information available to you. This is the information that Ticker Toolkit[™] will scan when you run the stock searches that you configure on the Control Panel. When you have multiple datasheets in your Ticker Toolkit[™] workbook, you will find it more convenient to click the 'Update All Datasheets' button at the top of the Control Panel to update multiple datasheets at once (Deluxe Only). The stock quote data fields remain static until you click an 'Update' button (either the 'Update' button on a specific datasheet or the 'Update All Datasheets' button on the Control Panel (Deluxe Only)).

My Acco	ount .	Contro	ol Panel	4/12/2015	8:26:11 PM												
Account	Sheet 🕜	Show Pr	ice Targets	Show \$			Show Cap	Show Div	Pay Dates					Show P/S			-
Symbol	Update	∆% Share	Last Share	Annual Dividend Vield (%)	Price / Earnings	Price/ Earnings / Growth	Earnings per Share	52-Week	52-Week	Bid	٨٥٢	50-day moving	200-day moving	Price / Book Batio	Fwd P/E @ next yr's est	Annual Dividend/	Notes
Hyperlink	Yahoo Einance	1.8%	THUC	1.3%	6.9	1.6	(1.3)	LOW	mgm	ыа	C.S.K	uveruge	uveruge	4.5	26.4	3.2%	notes
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 Grou	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. Commo	-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 Compan	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%	

Stock quote data is highlighted green to indicate a value that is favorable or red to indicate a value that is not favorable (based on the fair-value range that you defined with your Evaluation Thresholds). For example, FB's P/E is red because it exceeds your Upper P/E Threshold of 17.0 specified on the Control Panel (Lesson 9). Price targets, 52-week highs & lows, and moving averages are highlighted yellow when they are relevant to the last share price. For example, GE's 52-week high is yellow, because GE's last share price is 'at' its 52-week high (where 'at' is defined as being within the 'Proximity Tolerance' defined on the Control Panel. Once you become familiar with the Ticker Toolkit[™] color-coding, you will be able to quickly recognize stock valuation conditions that warrant further research or action.

Lesson 20: Stock Hype	rlinks (All E	ditions)									
	My Acc	ount	A Home	Mail	Search	News	Sports	Finance	Weather	Games	Answers
	Account	: Sheet 🕜 🔤	YAH	OO!	(af) 2						
		Update 🗛	Summary Order Book		Fac	ebook, Ir	nc. (FB) - 1	NasdaqGS ★	Watchlist		
	Symbo Hyperlin	Vahoo Einance	Options Historical P	rices	82	2.04	0.13(0	. 16%) Apr	10, <mark>4:00PM</mark> EE	т	
	FB	Facebook Inc.	CHARTS		After	r Hours : 82	.07 10.03 (0	.04%) Apr 10,	7:59PM EDT		
	GE	General Electric C	Interactive		Prev	Close:		82.17	Dav's Rano	e:	81.91 - 82.61
	GS	Goldman Sachs Grou	NEWS & INF	o	One	n:		82 20	52wk Range	.	54 66 86 07
	TGT	Target Corporation	Headlines		ope	11.		02.20	52 with realing	.	34.00 - 00.07
	TWTR	Twitter Inc. Commo	Press Relea	ses	Bid:			82.01 x 300	Volume:		12,529,738
	DIS	Walt Disney Compan	Company E	vents	Ask:			82.10 x 100	Avg Vol (3m	ו):	25,531,200
			Message Bo	ards	1y T	arget Est:		92.57	Market Cap	č.	229.63B

The stock names on each datasheet are hyperlinks that you customize on the Control Panel. Click on a stock name to open your preferred news/information source for a specific stock. Try the different hyperlinks that are configured in the example workbook to become familiar with the hyperlink capability of Ticker Toolkit[™]. You can change the currently active hyperlink via the pull-down menu at the top of the 'Name' column. See the on-line help (on the Ticker Toolkit[™] website) for detailed instructions and examples for configuring your custom hyperlinks (<u>http://www.tickertoolkit.com/help/online-help-library</u>).

Lesson 21: Set Price Targets (All Editions, with exceptions noted)

Account	Sheet 🕜	Hide Pric	e Ta	irgets				Show \$			Show Cap	Show Div	Pay Dates
Symbol	Update Name	Lower Price Target		Upper Price Target	∆% Share Price	La	ist Share Price	Annual Dividend Yield (%)	Price / Earnings (P/E)	Price/ Earnings / Growth (PEG)	Earnings per Share (EPS)	52-Week Low	52-Week High
Hyperlink	Yahoo Finance 💌				1.8%			1.3%	6.9	1.6			
FB	Facebook Inc.	\$ 70.00	\$	90.00	-0.2%	\$	82.04	0.0%	73.9	1.4	\$1.11	\$54.66	\$86.07
GE	General Electric C	\$ 23.00	\$	29.00	10.8%	\$	28.51	3.2%	19.0	2.2	\$1.50	\$23.41	\$28.68
GS	Goldman Sachs Grou	\$ 175.00	\$	195.00	0.4%	\$	195.64	1.2%	11.5	1.5	\$17.07	\$153.10	\$198.06
TGT	Target Corporation	\$ 65.00	\$	85.00	0.3%	\$	83.57	2.5%	(32.8)	1.5	(\$2.55)	\$55.25	\$83.74
TWTR	Twitter Inc. Commo	\$ 40.00	\$	70.00	-0.4%	\$	51.94	0.0%	(54.1)	1.8	(\$0.96)	\$29.51	\$55.99
DIS	Walt Disney Compar	\$ 85.00	\$	105.00	0.2%	\$	106.95	1.1%	23.8	1.5	\$4.50	\$76.31	\$108.94

Click on the 'Show Price Targets' button to reveal the Lower and Upper price target columns. Price targets are highlighted yellow when the current price is near or beyond your target, where 'near' is defined by the 'Proximity Tolerance' that you set in the Evaluation Thresholds on the Control Panel. If you enter a stock symbol on multiple datasheets, price targets for these duplicate symbols will automatically synchronize (Deluxe Only). You can edit price targets for a specific stock on any datasheet where that stock symbol appears. To enter a price target, place your cursor in the appropriate cell and enter your price target value. Click the 'Hide Price Targets' button to hide the price target columns. You can include these price targets in your programmed stock searches on the Control Panel as implemented in the workbook examples (the sample programmed search buttons titled 'At or Below Lower Price Target' and 'At or Above Upper Price Target') (Deluxe Only). Note that sample price targets have been entered here to illustrate the capability. Try entering your own price targets in the empty price target columns in the example datasheet.

My Acc	ount		Contro	ol Pa	anel				4	4/12/2015	8:26:11 PM	8									
Account	Sheet 🕜		Hide Prio	ce Ta	irgets	1		[S	Show %		[Show EPS	Show 52-	-Wk Hi/Lo					Show P/B	1
Symbol	Update Name	-	Lower Price Target		Upper Price Target	Δ% Share Price	La	ast Share Price	D	Annual ividend er share	Price / Earnings (P/E)	Price/ Earnings / Growth (PEG)	Market Cap	Ex- Dividend Date	Dividend Pay Date	Bid	Ask	50-day moving average	200-day moving average	Price / Sales Ratio	
Hyperlink	Yahoo Finance 💌					1.8%				1	6.9	1.6								8.5	
FB	Facebook Inc.	\$	70.00	\$	90.00	-0.2%	\$	82.04	\$	-	73.9	1.4	229.63B	N/A	N/A	\$82.01	\$82.10	\$80.94	\$77.66	18.5	
GE	General Electric C	\$	23.00	\$	29.00	10.8%	\$	28.51	\$	0.92	19.0	2.2	286.95B	19-Feb-15	27-Apr-15	\$28.54	\$28.56	\$25.44	\$25.29	1.7	
GS	Goldman Sachs Grou	\$	175.00	\$	195.00	0.4%	\$	195.64	\$	2.40	11.5	1.5	88.34B	26-Feb-15	30-Mar-15	\$195.45	\$195.66	\$190.45	\$187.21	2.6	
TGT	Target Corporation	\$	65.00	\$	85.00	0.3%	\$	83.57	\$	2.08	(32.8)	1.5	53.63B	13-Feb-15	10-Jun-15	\$83.18	\$84.00	\$79.97	\$72.40	0.7	
TWTR	Twitter Inc. Commo	\$	40.00	\$	70.00	-0.4%	\$	51.94	\$	-	(54.1)	1.8	33.11B	N/A	N/A	\$51.85	\$51.93	\$48.87	\$44.21	23.7	
DIS	Walt Disney Compan	\$	85.00	\$	105.00	0.2%	\$	106.95	\$	1.15	23.8	1.5	181.77B	11-Dec-14	8-Jan-15	\$106.85	\$106.99	\$105.79	\$95.65	3.6	
4 14	Control Panel M	y Ad	count	Abo	out / Re	lease Notes	6	°7 /											1	4	×.

Lesson 22: Toggle data columns (All Editions)

As you move from left to right across the datasheet, you'll notice buttons at the top of some columns (e.g 'Show \$,' 'Show Cap,' 'Show Div Pay Dates'). Click on these buttons to toggle the visible stock data columns. In order to fit the datasheet within a reasonable screen size, Ticker Toolkit[™] hides some columns by default. Simply click the buttons at the top of the columns to reveal the hidden data. To easily move left and right through the datasheet, use the scroll bar at the bottom right corner of the datasheet window.

Lesso	n 23 : Notes ar	nd	Check	bo	oxes (A	All Ed	itic	ons)									
	ount		Contro	P	anel												
Account	Sheet 🕜]		Hide Pric	e Ta	argets								Show P/B		6	Show Share Quantities & Values	
	Update		Lower Price		Upper Price	∆% Sha	ire	Last Share			50-day moving	200-day moving	Price / Sales	Fwd P/E @ next yr's est	Annual Dividend/		General Purpose
Symbol	Name Vahas Financo		Target		Target	Price	20%	Price	Bid	Ask	average	average	Ratio	earnings	Earnings	Notes	Checkbox
FB	Facebook Inc.	Ś	70.00	\$	90.00	-0.1	2%	\$ 82.04	\$82.01	\$82.10	\$80.94	\$77.66	18.5	31.9	0.0%	Note for FB	~
GE	General Electric C	\$	23.00	\$	29.00	10.	8%	\$ 28.51	\$28.54	\$28.56	\$25.44	\$25.29	1.7	15.8	61.3%	Note for GE	~
GS	Goldman Sachs Grou	\$	175.00	\$	195.00	0.4	4%	\$ 195.64	\$195.45	\$195.66	\$190.45	\$187.21	2.6	10.6	14.1%	Note for GS	~
TGT	Target Corporation	\$	65.00	\$	85.00	0.3	3%	\$ 83.57	\$83. 1 8	\$84.00	\$79.97	\$72.40	0.7	16.7	-81.6%	Note for TGT	~
TWTR	Twitter Inc. Commo	\$	40.00	\$	70.00	-0.4	4%	\$ 51.94	\$51.85	\$51.93	\$48.87	\$44.21	23.7	64.1	0.0%	Note for TWTR	~
DIS	Walt Disney Compan	\$	85.00	\$	105.00	0.3	2%	\$ 106.95	\$106.85	\$106.99	\$105.79	\$95.65	3.6	19.3	25.6%	Note for DIS	~

Scroll to the right to reveal the Notes column. Here, you can enter any notes about a stock. If you enter a stock symbol on multiple datasheets, notes will automatically synchronize for the duplicate symbols (Deluxe Only). You can edit notes for a specific stock on any datasheet where that stock symbol appears. Click the General Purpose Checkbox cell for one of your entered stock symbols to place a check in the symbol row. Typically, you'll check-off stocks to maintain your place as you review a datasheet. Click the top checkbox to clear all checks. Click the top checkbox again to place a check in all populated rows. Checkboxes for a stock symbol are NOT synchronized across datasheets. A stock may be 'checked' on one datasheet while being 'unchecked' on another datasheet (Deluxe Only). Note that a check may not be placed in a row that does not contain a stock ticker symbol.

My Acco	ount	Contro	ol Panel									
Account	Sheet 🕜	Show Pr	ice Targets	Show P/S		1			Hide Share Quan	tities & Values		1
Symbol	Update	∆% Share Price	Last Share Price	Price / Book Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Share Qty		\$ Value	Day Change	% of Total	Not
Hyperlink	Yahoo Finance 💌	1.8%		4.5	26.4	3.2%		\$	43,755.50	\$589.50		
FB	Facebook Inc.	-0.2%	\$ 82.04	6.3	31.9	0.0%	100.0000	\$	8,204.00	(\$13.00)	18.7%	Not
GE	General Electric C	10.8%	\$ 28.51	2.2	15.8	61.3%	200.0000	\$	5,702.00	\$556.00	13.0%	Note
GS	Goldman Sachs Grou	0.4%	\$ 195.64	1.2	10.6	14.1%	50.0000	\$	9,782.00	\$37.50	22.4%	Not
TGT	Target Corporation	0.3%	\$ 83.57	3.8	16.7	-81.6%	50.0000	\$	4,178.50	\$14.00	9.5%	Note
TWTR	Twitter Inc. Commo	-0.4%	\$ 51.94	9.1	64.1	0.0%	100.0000	\$	5,194.00	(\$23.00)	11.9%	Note
DIS	Walt Disney Compan	0.2%	\$ 106.95	4.1	19.3	25.6%	100.0000	\$	10,695.00	\$18.00	24.4%	Note
								and the second				

Lesson 24: Enter Share Quantities (All Editions)

Click on the 'Show Share Quantities & Values' button to reveal share quantity and value columns. You can enter share quantities in the 'Share Qty' column to track the value of individual holdings. You'll find this feature useful if you're tracking the value of a portfolio that you actually own or the value of an experimental portfolio (one that you do not actually own, but that is just for fun or learning). Stock quantity information is unique to each datasheet and is NOT synchronized across datasheets in your workbook. For example, you may record 100 shares of FB on one datasheet and 50 shares of FB on another datasheet (Deluxe Only). Note that sample share quantities have been entered here to illustrate the capability. Try entering your own share quantities on the datasheet.



Return to the Control Panel and click on the 'Add New Sheet' button in the 'Maintenance Operations' section. In the dialog box that appears, enter the name 'Technology' (without quotes) in the 'New Datasheet Name' textbox. Note that if you restored the example workbook 'comprehensive workbook example,' your workbook already contains a datasheet titled 'Technology' with pre-populated technology stock symbols. This lesson assumes that you do not yet have a 'Technology' datasheet.

Select the new datasheet type 'Sector Sheet.' Ticker Toolkit[™] manages three types of datasheets: 'Account' sheets include stocks that you own, 'Planning' sheets include stocks that you are watching for near-term actions (e.g. buy or sell) and 'Sector' sheets include stocks in sector categories that you define (e.g. Technology, Finance, Industrial, etc.). You'll find it helpful to categorize your stocks in themed datasheets so that you can customize stock searches to a particular datasheet type (e.g. you may want to limit some searches to stocks that you own or you may want to search stocks in all sectors for potential buying opportunities).

Select 'Last' for the position of your new datasheet and click 'Add.' Ticker Toolkit[™] will place the tab for your new datasheet after all of the other datasheet tabs in your stock investment workbook.

Technol	ogy		Contro	l Panel										
Sector Sh	eet 🕜		Hide Pric	e Targets						Show P/S			Show Share Quantities & Values	
	Update		Lower Price	Upper Price	∆% Share	Last Share		50-day moving	200-day moving	Price / Book	Fwd P/E @ next yr's est	Annual Dividend/		General Purpose
Symbol	Name Vaboo Einance		Target	Target	Price	Price	ASK	average	average	Ratio	earnings	Earnings	Notes	Checkbox
AAPL	Tanoo Tinance	<u> </u>			0.070					0.0	0.0	0.07		
FB			70.00	\$ 90.0	0								Note for FB	
TWTR			40.00	\$ 70.0	0								Note for TWTR	

Add stock ticker symbols to your datasheet by entering one symbol per empty cell in the symbol column. Note that when you enter a symbol that already exists on another datasheet (Deluxe Only), Ticker Toolkit[™] automatically synchronizes price targets and notes. You can change price targets and notes for a stock symbol in any datasheet where that duplicate symbol appears. Click the 'Update' button to retrieve stock quote data for your newly entered symbols. This stock quote data will be retrieved from the data source specified in the Query Add-in file. An example Query Add-in file is configured during installation so that you can immediately begin using Ticker Toolkit[™] with minimal configuration. To delete a symbol from a datasheet, click on the symbol to be deleted and press Backspace or Delete and press Enter. If the deleted symbol appears on other datasheet(s) (Deluxe Only) and has notes and/or price targets, Ticker Toolkit[™] will ask you if you would like to retain the notes/price targets for the deleted symbol. If you delete the last instance of a symbol in your workbook, Ticker Toolkit[™] will ask you to confirm that you want to delete the last instance before automatically deleting the associated notes and price targets for that symbol.

Lesson 27: Stock Searches (Deluxe Only)

		AS	election Cri	teria		Selection			B Sel	ectio	n Cri	iteria			
	A Preset 1	A Pres	set 2 A Preset 3		Clear A	Logic		B Preset 1	B Preset	2 B Pr	eset 3			Clear	в
Price	Change		50 Day 💌	200 Day 💌	52Wk Hi/Lo 💌	O A	Price	Change		50 Day		200 Day		52Wk Hi/Lo	•
Yield	Lower		Upper 💌			ОВ	Yield	Lower		Upper					
P/E	Lower		Upper 💌	Pos/Neg 💌		O A Or B	P/E	Lower		Upper		Pos/Neg			
Fwd P/E	Lower		Upper 💌	PE 💌	Pos/Neg 💌	O A And B	Fwd P/E	Lower	•	Upper		PE		Pos/Neg	
Div/E	Lower		Upper 💌	Pos/Neg 💌		O A, Not B	Div/E	Lower		Upper		Pos/Neg	-		

One of the most powerful features of Ticker Toolkit[™] is its ability to store and execute pre-programmed searches via the Preset buttons on the Control Panel. Since the searches become increasingly more meaningful as your Ticker Toolkit[™] workbook expands with more datasheets and more stock symbols, restore the example workbook titled 'comprehensive workbook example' for this lesson. After you restore the example workbook, click the 'Update All Datasheets' button at the top of the Control Panel. When the update has completed, all of your datasheets will be updated with stock data from the data source specified in the Query Add-in file (an example Query Add-in file is configured for you during installation, so that you can immediately begin using Ticker Toolkit[™] with minimal configuration). For this lesson, let's create a simple stock search that selects all stocks whose price has increased, whose P/E Ratio is below our Upper P/E Threshold and whose Forward P/E Ratio is below our Lower P/E Threshold. Before configuring our search, clear the current selection criteria by clicking the 'Clear A' and 'Clear B' buttons highlighted in the figure above. Lesson 28: Stock Searches (continued) (Deluxe Only) A Selection Criteria Selection **B** Selection Criteria Logic A Preset1 | A Preset2 | A Preset3 B Preset 2 B Preset 3 Clear A B Preset 1 Clear B 50 Day 🔻 Price $\sqrt{}$ Uptick -200 Day 🔻 52Wk Hi/Lo 🔻 Price Change 🔻 50 Day 🔻 200 Day 🔻 52Wk Hi/Lo 🔻 • A . Yield Yield Lower -Upper 🔻 OB Lower Upper 🔻 P/E -≤ Upper -Pos/Neg 🔻 P/E --Pos/Neg -Lower O A Or B Lower Upper Fwd P/E -• Fwd P/E Lower 💌 -≤Lower -Upper PE Pos/Neg 🔻 Upper -PE Pos/Neg 🔻 O A And B Div/E Div/E -Pos/Neg 💌 --Pos/Neg 🔻 Lower -Upper O A, Not B Lower Upper

Click 'A' under the 'Selection Logic' heading to indicate that our programmed search uses only the 'A Selection Criteria.' In the 'A Selection Criteria,' select Price: 'Uptick', P/E: ' \leq Upper' and Fwd P/E: ' \leq Lower' as shown in the figure above. Note that configured (active) selection criteria have a ' $\sqrt{}$ ' (check) next to them while the inactive selection criteria do not have a ' $\sqrt{}$ ' (check).

Lesson 29: Stock Searches (continued) (Deluxe Only)

		Select Stocks from		User-Programmable Stock Selec	tion Presets	
	Update All	All Sheets	Find Symbol / Name	Growth or Yield	Preset 5	Top Winners
AL.	Datasheets	Select Stocks from Account Sheets	Go To Sheet	Growth or Yield - Low PBook	Growth or Yield - Below Averages	Top Losers
Ticker Toolkit™		Select Stocks from Sector Sheets	Show Preset Programming	Preset 3	At or Below Lower Price Target	Wild Bid/Ask
	🕜 Help	Select Stocks from Specifed Sheets	Program Clear Preset Preset	Growth or Yield - Below Avgs / Uptick	At or Above Upper Price Target	Below Averages

Click the 'Select Stocks From All Sheets' button to test your search. The stocks whose metrics match your search criteria (Selection Criteria combined with Evaluation Thresholds) will be displayed in the 'Report' datasheet (a new datasheet that is automatically created by Ticker Toolkit[™] each time you perform a stock search). Inspect the Report to confirm that your search is working properly. Only stocks matching your search criteria (Selection Criteria combined with your Evaluation Thresholds) should appear in the Report.

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		Select Stocks from	1	10	- User-Programmabl	e Stock Selectio	n Presets		Search Scope	
11/	/ Update All	All Sheets	Find Symb	ol / Name	Growth or Yield		Preset 5	Top Winners	Select the Scope of Your Stock	
AL.	Datasheets	Select Stocks from Account Sheets	Go To Sheet		Growth or Yield - Low PBook		Growth or Yield - Below Averages	Top Losers	Search	
Ticker Toolkit™		Select Stocks from Sector Sheets	Show Preset Programming		Preset 3		At or Below Lower Price Target Wild Bid/Ask		C All Datasheets	
		Select Stocks from Specifed Sheets	Program Preset	Clear Preset	Growth or Yield - Below Avgs / Uptick		At or Above Upper Price Target	Below Averages	C Account Datasheets	
A Selection Criteria			Selectio	on B Selection Criteria				C Sector Datasheets		
A Pre	eset1 A Preset2 A Pr	eset 3	Clear A	Logic		B Preset 1	B Preset 2 B Preset 3	Clear B	C Specific Datasheet	
Price √ u	Jptick 💌 50 Day	💌 200 Day 💌	52Wk Hi/Lo 💌	• A	Price	Change	50 Day 💌 🛛 2	00 Day 💌 🛛 52Wk Hi/Lo 💌		
Yield	Lower 💌 Upper			ОВ	Yield	Lower	Upper V			
P/E	Lower ▼ √ ≤ Upper	Pos/Neg 💌		O A Or B	P/E	Lower	Upper V	os/Neg	User Selectable	
Fwd P/E ∫√ ≤	Lower 💽 Upper	PE V	Pos/Neg 💌	O A And B	Fwd P/E	Lower	Upper	PE Pos/Neg		
Div/E	Lower Upper	Pos/Neg 💌		O A, Not B	Div/E	Lower	Upper V	os/Neg 💌	OK Cancel	
EPS F	Pos/Neg			O B. Not A	EPS	Pos/Neg	•		Cancer	

After you've confirmed that your search is working properly, assign your search to the 'Preset 3' button as follows: On the Control Panel,

- Click the 'Program Preset' button
- Click the 'Preset 3' button
- Select the 'User Selectable' scope' and click 'OK.'

Lesson 31: Stock Searches (continued) (Deluxe Only)

Lesson 30: Stock Searches (continued) (Deluxe Only)

-	Update All	Select Stocks from	Find Symbol / Name		User-Programmable Stock Select	tion Presets	Enter Button Name			
		All Sheets			Growth or Yield	Preset 5	Top Winners			
	Datasheets	Select Stocks from Account Sheets	Go To	Sheet	Growth or Yield - Low PBook	Growth or Yield - Below Averages	Top Losers	Specify preset button name.		
Ticker Toolkit™		Select Stocks from Sector Sheets	Show Preset Programming		Preset 3	At or Below Lower Price Target	Wild Bid/Ask			
	🕜 Help	Help Select Stocks from Specifed Sheets Program Preset		Clear Preset	Growth or Yield - Below Avgs / Uptick	At or Above Upper Price Target Below Averages		Test		

Enter 'Test' (without quotes) for your new programmed search button name and click 'OK.'

Lesson 32 : Stock Searches (continued) (Deluxe Only)

Ticker Toolkit™		Select Stocks from		1	User-Programmable Stock Selection Presets			
	Update All	All Sheets	Find Symbol / Name		Growth or Yield	Preset 5	Top Winners Top Losers Wild Bid/Ask	
	Datasheets	Select Stocks from Account Sheets	Go To Sheet		Growth or Yield - Low PBook	Growth or Yield - Below Averages		
		Select Stocks from Sector Sheets Programming		Preset mming	Test	At or Below Lower Price Target		
	🕜 Help	Select Stocks from Specifed Sheets	Program Preset	Clear Preset	Growth or Yield - Below Avgs / Uptick	At or Above Upper Price Target	Below Averages	

Now click your 'Test' button to try it.

To see all of the stock selection criteria that are available for your programmed searches, scroll down in the Control Panel to the 'Display Settings' and find the 'Sheet Visibility' checkboxes. Place a check in the 'Selection Criteria Definitions' check box to expose the hidden 'Selection Criteria Definitions' sheet. Then click on the "Selection Criteria Definitions' tab at the bottom of your workbook.

Lesson 33: Activate Your Copy of Ticker Toolkit[™] (All Editions)

If you wish to continue using Ticker Toolkit[™] beyond your 30-day free trial evaluation period, visit <u>http://www.tickertoolkit.com/purchase</u> and follow the license activation instructions. As instructed, you will need your unique 'Computer Code' to obtain your license key. To obtain your Computer Code, click on the 'Ticker Toolkit' menu in the Excel command ribbon at the top of your Ticker Toolkit[™] workbook window and then click on 'Register.'



Click the 'Copy to clipboard' button in the dialog box that appears and then paste the Computer Code as instructed on the Ticker Toolkit[™] website purchase page.

You may purchase the 'TTK Basic Edition' which provides the ability to create a single stock datasheet (holds up to 193 stocks) that is color-coded according to your own custom evaluation thresholds or you may purchase 'TTK Deluxe Edition' which empowers you to create an unlimited number of datasheets with the ability to create pre-programmed stock searches.

Visit <u>http://www.tickertoolkit.com</u> for detailed features, capabilities and pricing for each Ticker Toolkit[™] product.