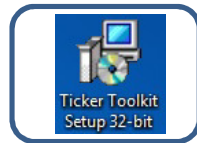# Ticker Toolkit™ Quickstart Guide v1.0.8

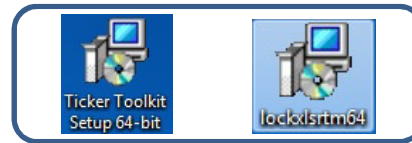*Installation Requirements: Ticker Toolkit™ requires a PC running any version of Microsoft Windows and Excel 2007, Excel 2010, Excel 2013 or Excel 2016.*

Step 1: Run Ticker Toolkit™ Setup (if necessary, follow the detailed Ticker Toolkit™ installation guide)

32-bit Excel

64-bit Excel

Depending on your version of Microsoft Excel, download the appropriate 32-bit or 64-bit 'Ticker Toolkit Setup.msi' setup file from http://www.tickertoolkit.com/download. Run the Ticker Toolkit™ installation and follow the prompts to begin your 30-day free trial of Ticker Toolkit™. Install LockXLS Runtime if you are running 64-bit Excel.

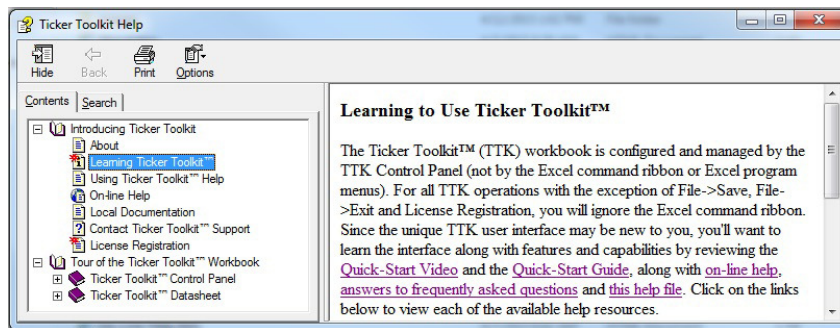**Step 2**: Start Ticker Toolkit™ for the first time

The Ticker Toolkit™ installation places a shortcut on the Windows desktop and in the Windows Start Menu. Select the shortcut in the Start Menu or double-click on the desktop shortcut to start Ticker Toolkit™.
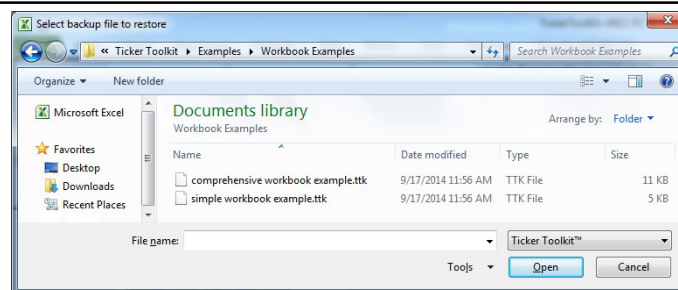
Click to enable content if your Excel Macro security restricts program execution.

Step 3: Built-in Help

When you run Ticker Toolkit™ for the first time, the built-in searchable help viewer appears after the welcome screen. Get help by clicking the [Help] and [?] buttons in your Ticker Toolkit™ workbook.

Step 4: Open an example workbook

Deluxe Edition: Scroll down in the Control Panel to the 'Maintenance Operations' section and click 'Full Restore.' Navigate to 'Ticker Toolkit->Examples->Workbook Examples->comprehensive workbook example' file which has two empty datasheets for your own stock entries and 'Sector' datasheets populated with sample stocks.

Basic Edition: Click on the 'Control Panel' button, click 'Full Restore' and navigate to 'Ticker Toolkit->Examples->Workbook Examples->simple workbook example' which contains a single empty datasheet.

Example Workbooks: The example workbooks are pre-configured with evaluation thresholds, stock selection criteria (Deluxe Edition only), and programmed search preset buttons (Deluxe Edition only). You'll want to change these to meet your own stock analysis requirements after you become familiar with Ticker Toolkit™.

Step 5: Enter stock symbols and retrieve stock data

							Account Sheet ❓ ... Show Price Targets	Show $		Show Cap	Show Div Pay Dates							Show P/S	

		Δ% 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
	Update														
Symbol	Name	Price	Price	Yield (%)	(P/E)	(PEG)	(EPS)	Low	High	Bid	Ask	average	average	Ratio	earnings
Hyperlink	Yahoo Finance ▼	1.8%		1.3%	6.9	1.6								4.5	26.4
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
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
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
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
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
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

Click on the worksheet tab (bottom of window) titled 'My Account' to open an empty datasheet provided in the example workbook. Enter stock ticker symbols by clicking in an empty cell in the 'Symbol' column under the 'Symbol' heading and typing each ticker symbol into its own cell. For example, to duplicate the symbols pictured in the figure above, click any empty cell under the 'Symbol' heading and type fb <Enter> ge <Enter> gs <Enter> twtr <Enter> dis <Enter> and then click the 'Update' button.   Once updated, stock data is static until you click the 'Update' button on the datasheet or click the 'Update All Datasheets' button on the Control Panel.

Step 6: Research hyperlinks

Datasheets are the building blocks for Ticker Toolkit™. Each datasheet displays stock quote data color-coded according to the evaluation thresholds configured on the Control Panel. If the fundamentals of a specific stock pique your interest, click on the name of the stock (a hyperlink) to open the stock news/information source that has been configured on the Ticker Toolkit™ Control Panel. You will be able to customize your own hyperlinks based on your personally trusted sources of stock information. Review the on-line help on the Ticker Toolkit™ website to learn to customize your own reference hyperlinks (http://www.tickertoolkit.com/help/online-help-library).

Step 7: Activate your copy of Ticker Toolkit™

In addition to experimenting with the example workbooks, explore the instructional documents located in the 'Ticker Toolkit->Documentation' folder on your PC. Visit http://www.tickertoolkit.com for on-line instructions, videos, more documentation and more examples.

If you wish to continue using Ticker Toolkit™ beyond your 30-day free trial evaluation period, visit http://www.tickertoolkit.com/purchase and follow the purchasing instructions. 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 stock datasheets with the ability to create pre-programmed stock searches.

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

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