CGSI CFD ViewPoint Features and Functions

Getting Started

Please visit our website : www.cgsi.com.my/en/cfd to find out more about our CFD products.

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1.0 Introduction

CGS CFD ViewPoint is an intuitive, easy-to-use market data and trading platform built on **HTML5** technology.

It offers a highly customisable user interface, a comprehensive library of widgets, and the ability to log in via the latest versions of all major web browsers with no dependencies on 3rd party plug-ins.

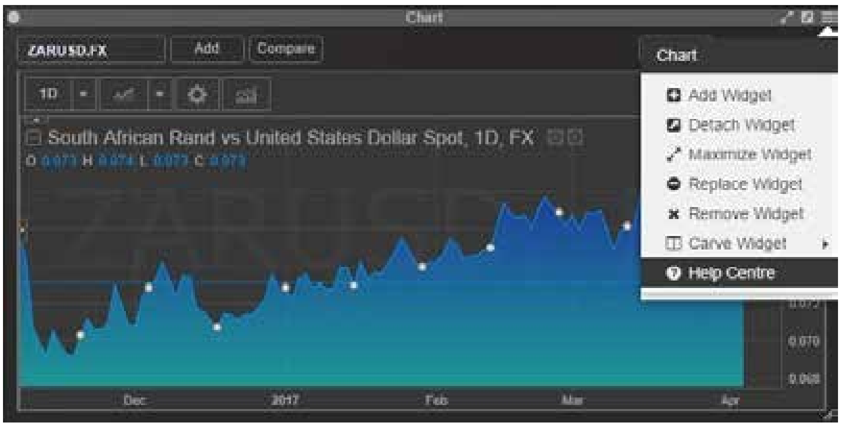
Much of the content is available through ViewPoint's in-line help functionality, which can be accessed via the "**Help Centre**".

1.1 Accessing Help Centre

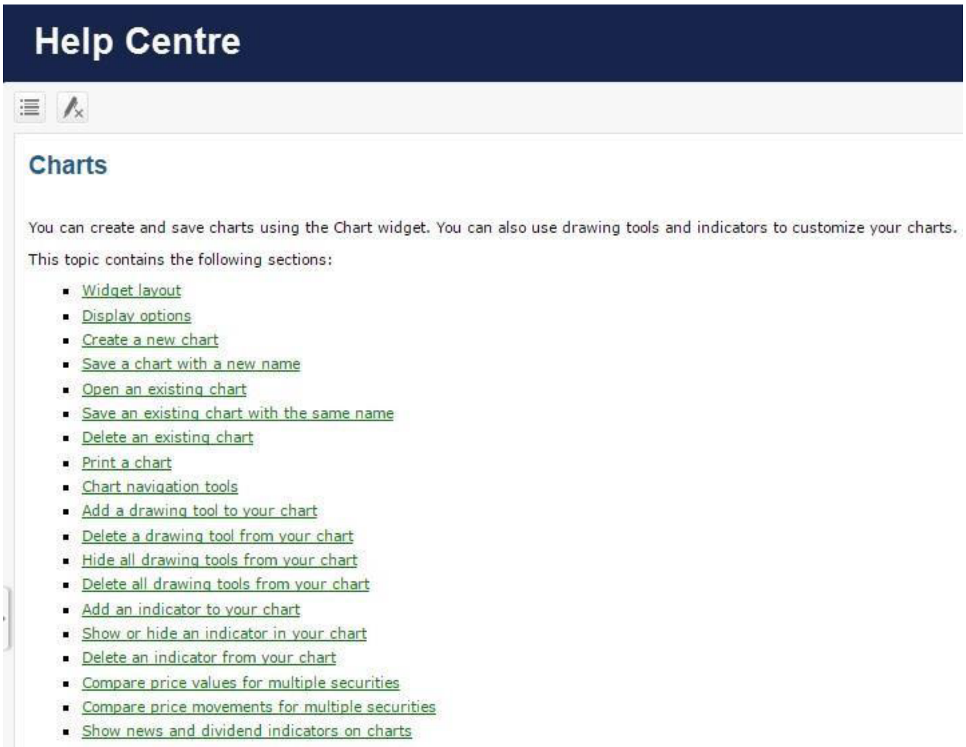
To view in-line help, simply click the "**Menu**" button on the top-right hand side of the ViewPoint application and select "**Help Centre**".

1.2 Accessing Help Centre for a Specific Widget

For help with a specific widget**, c**lick the **"**widget menu" in the top right-hand **corner of the widget and** select **"Help Centre".**



This displays help **information** specific to that widget.



2.0 Getting Started – The Basics

The following list of topics relate to basic application functions such as navigation, screen elements and application layout.

Application Basics	**Customize the Application**
Menu Bar - provides more information about the menu bar, which displays along the top of the application Application Menu - the application menu lets you change settings for your widgets, worksheets, alerts and overall layout Widget Menu - the widget menu lets you change settings specifically for a widget Inline Action Menu - the inline action menu displays in some widgets and lets you perform actions specifically for that widget Search Bar - search for security codes, watch list codes, people, widgets, templates, orders, news headlines, etc. Drag and Drop Codes - drag and drop a security code from one widget to another Broadcast Codes - configure "broadcasting," which lets you simultaneously display data for a single security code in multiple widgets Logging In and Out - provides more information about logging in and out of the application Keyboard Shortcuts - provides a list of keystrokes you can use in the application Using the Help Centre - provides more information about using the Help Centre	Divide Your Screen into Widget Spaces - customize your workspace by dividing your screen into different widget spaces Configure Language Preferences - set the default language for the application Column Formatting - choose how columns display in your widgets Customize Worksheets - create, rename and delete worksheets Select a Worksheet Template - apply a pre-defined template to your worksheet Customize Widgets - dynamically resize, move, maximize, replace, detach, remove or dock a widget Add Widget from the Widget Library - add a widget to your worksheet from the widget library

2.1 Widget List

2.1.1 Market Data

Widget	Description
Chart	View and create charts for detailed analysis.
Market Activity	View market information based on user selected criteria.
Market Depth	View the depth of market for a security.
Market Status	Display the status (open, closed, etc.) for markets around the world.
News	Display news headlines in descending chronological order.
News Ticker	Display a scrolling ticker of news headlines.
Quote	View live price quotes for a security.
Quote Ticker	Display a scrolling ticker of live price quotes for a selection of security codes.
Watch list	View and create "watch lists" of security codes.

2.1.1 Security Analysis

Widget	Description
Adjustments	View adjustments made to issued capital (for example, rights and consolidations).
Course of Sales	View the history of trades for a security.
Dividends	View dividend information for a security.
Security Info	Display detailed information about a security.
Time Series	Display historical security information for a security.
Trade Analysis	Display daily trades grouped by price.

2.1.3 Trading

Widget	Description
Order Pad	Displays status of current and historical orders.
Portfolio	Displays your portfolio with a summary and detailed view.
Trades	Displays detailed information about all trades for a specified time period.

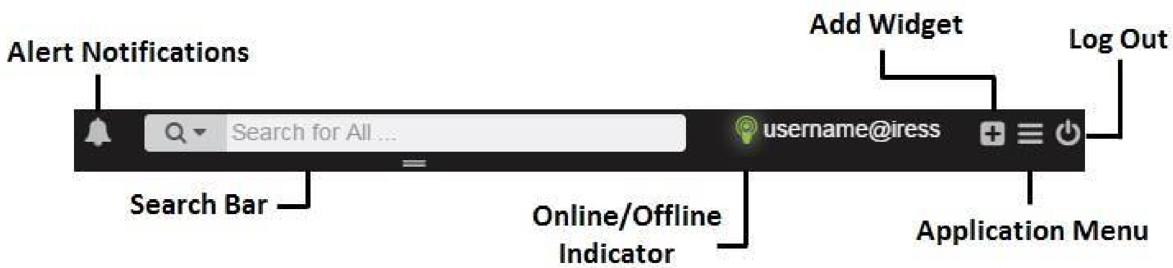
2.1.4 Media

Widget	Description
Video Widget	If enabled, display video content.

2.2 Menu Bar

The application menu bar includes the following components:

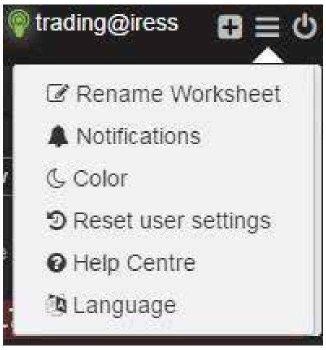
- Alert Notifications
- Search Bar
- Online/Offline Indicator
- Help button
- Add Widget button
- Application Menu button
- Log Out button



2.3 Application Menu

Clicking the application menu button displays a range of options related to your widgets, worksheets, alerts, and overall layout:

- **Widget** – Detach, remove, replace, add, maximize or carve widget.
- **Rename Worksheet** - change the name of your worksheet.
- **Notifications** - configure alert notifications.
- **Light Theme/Dark Theme** - change your colour scheme to the light theme or the dark theme.
- **Reset user settings** - reset your layout.
- **Help Centre** - launch the Help Centre.



2.4 Widget Menu

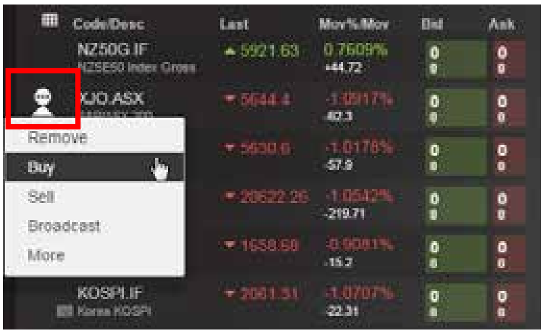
Click the widget menu in the top right-hand corner of any widget to display the following drop-down list of widget actions:

- **Add Widget** - open the Add Widget dialog box to add a new widget to your widget space.
- **Detach Widget** - open the widget in a new browser window on top of your workspace.
- **Maximize Widget** - open the widget in a large pop-up window on top of your workspace.
- **Replace Widget -** open the Replace Widget dialog box to replace your widget with a different one.
- **Remove Widget** - remove the widget from its widget frame. From there, you can add another widget into the widget frame or divide the widget frame into more widget frames (e.g., a 2x2 frame or a 4x4 frame).
- **Carve Widget** - "carve" or divide the widget frame into more widget frames (e.g., a 2x2 frame or a 4x4 frame).
- **Help Centre** - display the relevant Help Centre topic for the widget.

2.5 Inline Action Menu

Click the inline action menu in certain widgets to display menu options specific to that widget. For example, in the Watchlist widget, the inline action menu lets you remove a quote from your watchlist or broadcast a security code in your watchlist to other widgets.

Note: The inline action menu only displays when you hover your cursor over a row in the widget.



2.6 Search Bar

You can use the search bar in the application menu bar at the top of your screen to search for any of the following:

- Securities
- Watchlists
- News headlines
- Layout elements (e.g., widget names, template names)
- Positions
- Orders

You can either do a basic search (in all of the above categories), or you can search by a specific category. Simply start typing in the search bar, the application displays suggested search results for all categories as you type.

2.7 Drag and Drop Codes

You can drag a security code from one widget to another, and the widget automatically updates to display relevant information for that security.

Note that you can only drag and drop codes into widgets that have a Code box (e.g., Quote, Watchlist, News).

To drag and drop a security code, hover your cursor over the security code in the first widget. A black arrow displays next to your cursor.

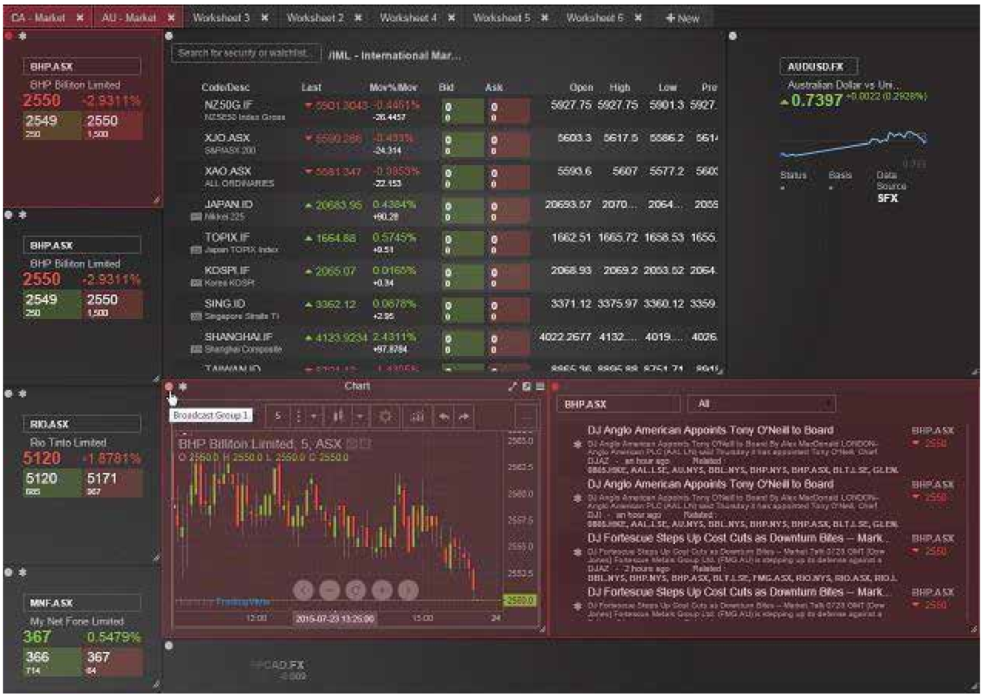
Then drag your cursor to the second widget, which displays in a green dashed line to indicate the security code will be dropped there. Release the mouse button and the widget will update with the new security code.

2.8 Broadcast Codes

The Broadcast function displays data for a selected code in widgets that accept a single security code as input criteria. For example, you can broadcast a security code from a Quote widget into an open Chart, Depth and Security Information widget simultaneously. The Quote, Chart, Depth and Security Information widgets would all be a part of the same "broadcast group."

2.8.1 Broadcast a security to multiple widgets

1. In the widget that you want to broadcast from, click  in the top left-hand corner of the widget. A row of coloured circles displays.
2. Choose a coloured circle to represent the widgets that will comprise your broadcast group. For example, if you choose , any other widget for which you choose that colour will be a part of the same broadcast group.
3. Repeat steps 1-2 for each of the widgets that you want included in your broadcast group. When you hover over a coloured circle, all of the widgets currently in that broadcast group display in that colour.



2.9 Logging In and Out

You should always log out of the application to ensure your login data is correctly cleared from the server. The Online/Offline indicator in the application menu bar at the top of your screen shows you whether you are logged in or logged out:

1. To **log out**, click in the top right-hand corner. The **Log out** dialog box opens, asking you to confirm whether you want to log out.
2. Click **Yes**.

2.10 Keyboard Shortcuts

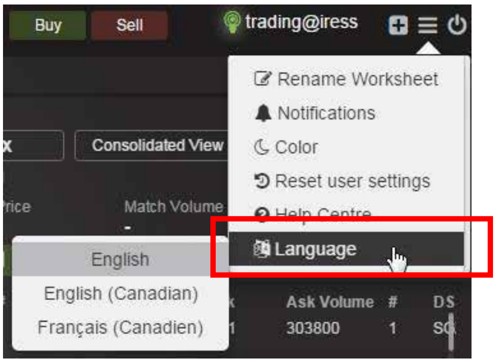
You can use the following keyboard shortcuts in the application.

Keyboard Shortcut	Function
Alt+B	Open the Order Entry ticket to create a **buy order.**
Alt+S	Open the Order Entry ticket to create a **sell order.**
Alt+F5	Broadcast security code in selected widget to all widgets in that broadcast group.
Alt+Shift+A	Open the **Add Widget** dialog box.
Alt+Shift+F11	Maximize the selected widget.
Alt+Shift+F12	Detach the selected widget.
Alt+Shift+Up arrow	Select the widget above the currently selected widget.
Alt+Shift+Down arrow	Select the widget below the currently selected widget.
Alt+Shift+Right arrow	Select the widget to the right of the currently selected widget.
Alt+Shift+Left arrow	Select the widget to the left of the currently selected widget.
Alt+N	Create a new worksheet.
Alt+PgDown	Jump to the next worksheet tab.
Alt+PgUp	Jump to the previous worksheet tab.

2.11 Configure Language Preferences

You can set your preferred language for the application.

1. Click the application menu in the top right-hand corner of the screen.
2. Navigate to **Language**. A list of language options displays in the menu.
3. Select the language you want to use, and the application will automatically display in the new language.



2.12 Using the Help Centre

The application includes an online Help Centre that provides information about the application. You can access the Help Centre in one of the following ways:

1. Click the application menu button in the top right-hand corner of the application and select **Help Centre**.
2. Click the widget menu in the top right-hand corner of a widget and select Help Centre. This displays help specific to that widget.

The Help Centre window has two tabs:

- **Contents**: a table of contents. This is the default tab.
- **Index**: an alphabetical list of keywords.

In addition, the **Search** bar in the top right-hand corner lets you search the help for a specific subject.

2.12.1 Use the Table of Contents

The table of contents displays books and pages. Pages represent individual help topics, while books represent groups of related help topics.

1. Select the **Contents** tab.
2. To open a book, click on the book. The topics in the book display.
3. To view a topic, click a page. The topic displays in the right-hand pane.

2.12.2 Use the Index

1. Select the **Index** tab.
2. In the keyword box, type in the first few letters of a keyword you want to find. The index highlights the first word beginning with your letters.
3. Click the keyword you are interested in.

If there is only one topic associated with the keyword, the topic displays in the right-hand pane.

2.12.3 Use Search Function

1. In the **Search** bar in the top right-hand corner of the window, type a search word and press **Enter** or click .
2. Type a search word into the box and press **Enter**. A list of topics containing your search words displays below the box.
3. Click a title to display the topic in the right-hand pane.

2.12.4 Hide the Navigation Pane

Click **Hide Pane** in the separator between the navigation pane and the help topic pane.

2.12.5 Display the Navigation Pane

In a help topic, click **Show Pane** in the separator between the navigation pane and the help topic pane.

3.0 Divide Your Screen into Widget Space

Widgets are specific tools you can use to perform tasks in the application. Widget spaces are placeholders for these widgets. You can add widgets to empty widget spaces or to widget spaces that already contain a widget.

When you create a new worksheet, you can choose how to "carve" or divide your screen into various widget spaces. The easiest way to do this is with the **Divide your screen** button on a new worksheet, but you can also divide an existing widget space into multiple widget spaces.

3.1 Divide a new screen into multiple widget spaces

1. On your new worksheet tab, click the Divide your screen button

2. The Carve Menu displays.

3. Select one of the following:

- **Split Vertically** - divide your screen into two vertical widget spaces
- **Split Horizontally** - divide your screen into two horizontal widget spaces
- **2x2** - divide your screen into four widget spaces, two across and two high
- **2x2 Quotes** - divide your screen into four widget spaces, two across and two high, and populate each widget space with the Quote widget
- **4x4** - divide your screen into eight widget spaces, four across and four high

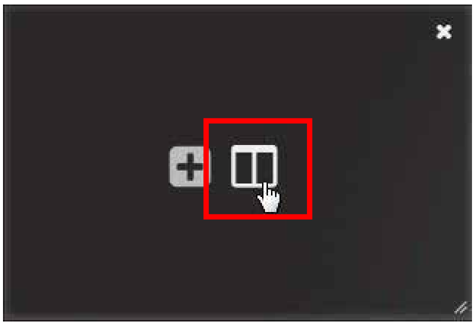
The new worksheet is split into the selected number of widget spaces, and you can individually add widgets to these widget spaces to finish customizing your worksheet.

3.2 Divide an existing widget space into multiple widget spaces

If you already have an existing widget space, you can divide it even further into multiple widget spaces. You can do this for empty widget spaces or for widget spaces that already contain a widget.

3.2.1 For Empty Widget Spaces

1. In your empty widget space, click the Carve Menu button.
2. The Carve Menu displays.



3. Select one of the following:

- **Split Vertically** - divide your screen into two vertical widget spaces
- **Split Horizontally** - divide your screen into two horizontal widget spaces
- **2x2** - divide your screen into four widget spaces, two across and two high
- **2x2 Quotes** - divide your screen into four widget spaces, two across and two high, and populate each widget space with the Quote widget
- **4x4** - divide your screen into eight widget spaces, four across and four high

The empty widget space is split into the selected number of widget spaces, and you can individually add widgets to these widget spaces.

3.2.2 For Widget Spaces that already Contain a Widget

1. In a widget space that already contains a widget, click the widget menu.
2. Choose Carve Widget. The Carve Menu displays.

3. Select one of the following:

- **Split Vertically** - divide your screen into two vertical widget spaces
- **Split Horizontally** - divide your screen into two horizontal widget spaces
- **2x2** - divide your screen into four widget spaces, two across and two high
- **2x2 Quotes** - divide your screen into four widget spaces, two across and two high, and populate each widget space with the Quote widget
- **4x4** - divide your screen into eight widget spaces, four across and four high

The widget space is split into the selected number of widget spaces, with the existing widget moving to the top right (or just to the top or right, if you selected **Split Vertically** or **Split Horizontally**). You can then add widgets to the new widget spaces.

4.0 Column Formatting

Many widgets display columns of information. You can customize how this information displays by rearranging the order of columns and by sorting in ascending or descending order. You can also choose to show and hide columns for some widgets.

4.1 Rearrange the order of the columns

Click the heading of a column and then drag and drop the column heading to a new location.

4.2 Sort Columns

A column may be sorted into ascending or descending order.

1. The first time you click a column heading, the column will be sorted in ascending order. The column name is italicized, and an arrow pointing up displays next to the column heading.
2. The second time you click the column heading, the column will be sorted in descending order. The column name is italicized, and an arrow pointing down displays next to the column heading.

4.3 Show and hide columns for specific widgets

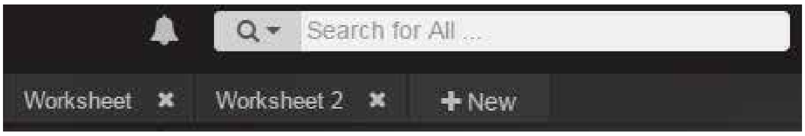
Some grid-based widgets allow you to show and hide columns using the **Configure Table** dialog box. For more information, refer to each of the following help topics:

- Adjustments
- Course of Sales
- Dividends
- Watchlist

5.0 Customize Worksheets

Worksheets consist of specific widgets that you can display in different ways to suit your needs. You can create different worksheets for different purposes (e.g., you might create one worksheet for viewing local market data, and one worksheet for viewing your portfolio).

Tabs for individual worksheets display in a row along the top of your screen, so you can easily click between your various worksheets



This topic is divided into the following sections:

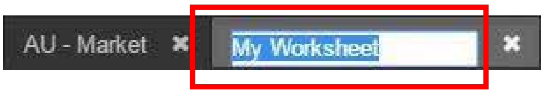
1. Create a new worksheet
2. Rename your worksheet
3. Delete your worksheet
4. Customize your worksheet layout

5.1 Create a new worksheet

In the row of worksheet tabs at the top of your screen, click + New. A new worksheet tab displays at the end of the row. New worksheets are automatically named **Worksheet**, **Worksheet 2**, **Worksheet 3**, etc.

5.2 Rename your worksheet

To rename your worksheet, simply double-click the worksheet tab and type in a new name.



5.3 Delete your worksheet

To delete your worksheet, click the ✖ button in the worksheet tab. Then click **Remove Worksheet**.

5.4 Customize your worksheet layout

You can customize your worksheet layout in any of the following ways:

- Use a pre-defined template to automatically populate your worksheet with specific widgets. Use the widget library to manually add specific widgets.
- "Carve" or divide your screen into various widget spaces, and then manually add widgets for each widget space.

6.0 Select a Worksheet Template

When you are adding a new worksheet, you may want to use a ready-made worksheet template to save time. Templates are pre-defined with specific widgets depending on the "theme" of the template (for example, you can choose a template intended specifically for viewing local market data).

To select a template for your new worksheet:

- Click the **Add a template** button.

The **Choose Template** dialog box opens:

1. **Search for a specific template**

   If you know the name of the template you want, you can start typing the template name into the Search bar on the left-hand side of the dialog box. Templates matching your search criteria display on the righthand side.

2. **Browse for a template based on category**

   You can click through the template categories on the right-hand side of the dialog box to view templates in each category (Market Data, Analysis, etc). Or you can click All to view all available templates.

   a) Click the button for the template you want.

   b) Click OK. The template is applied to your worksheet.

7.0 Customize Widgets

You can customize the widgets in your worksheet in a number of ways — for example, you can dynamically resize them, add multiple widgets to the same widget space, open widgets in a new browser window, maximize widgets to full-screen view, replace widgets with different widgets, and dock widgets to one side of the screen.

You can also divide your screen into different widget spaces and add widgets from the widget library.

This topic is divided into the following sections:

- Resize widgets
- Move a widget from one widget space to another
- Add multiple widgets to the same widget space
- Detach widgets
- Maximize widgets
- Replace widgets
- Remove widgets
- Dock widgets

7.1 Resize widgets

When you resize a widget in your worksheet, all of the surrounding widgets are automatically resized based on the modified space. For example, if you resize a widget to make it smaller, the surrounding widgets will increase in size to take up the new space.

To resize a widget horizontally or vertically, hover your cursor over one of the horizontal or vertical edges of the widget space until a thick grey line displays and your cursor changes into a double-headed arrow.

Or, to resize the widget diagonally, click 

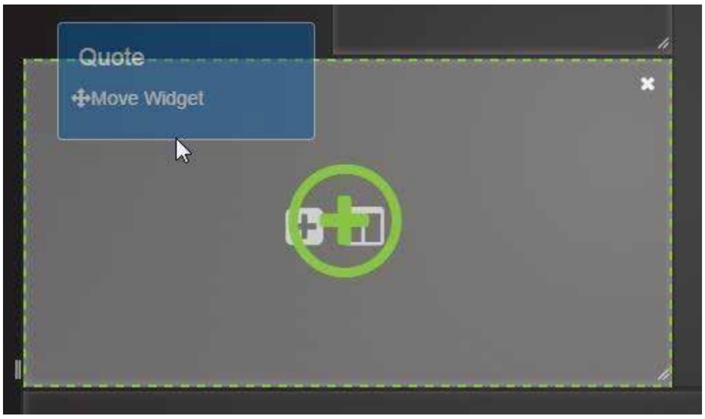
in the bottom right-hand corner of the widget.

Click and drag to change the size and shape of the widget. The surrounding widgets change in size and shape accordingly.

Note: Resizing widgets may change the amount of data or detail displayed. If you make a widget too small, it might not display content properly and the widget space will simply display the widget's name, with no data. If this happens, resize the widget to make it larger so you can see data again.

7.2 Move a widget from one widget space to another

You can easily drag and drop a widget from one widget space to another. Simply click the title bar of a widget and drag the widget on top of a new widget space. A green dashed line will display around the widget space to indicate where the dropped widget will display. Release the mouse button to drop the widget into that widget space.



7.3 Add multiple widgets to the same widget space

Each widget space can contain more than one widget simultaneously. When you add multiple widgets to the same widget space, a tab for each widget displays in the top left-hand corner of the widget space. You can then click the tabs to move between the widgets.

To add another widget to a widget space that already contains a widget, click the widget menu  and select **Add Widget**.

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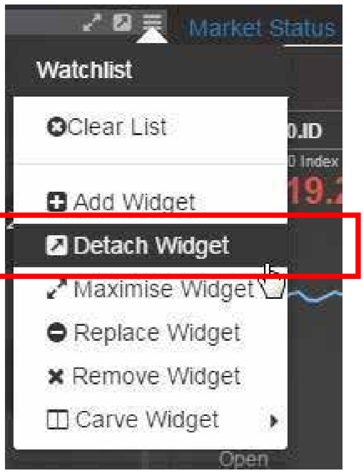
7.4 Detach widgets

If you prefer to view your widget in its own browser window, you can detach it. Simply click the widget menu and select **Detach Widget**.



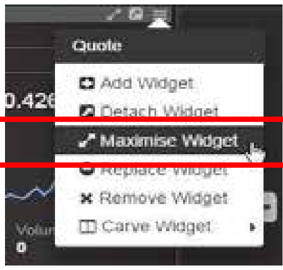
The widget automatically displays in a new browser window.

7.5 Maximise widgets

To maximise your widget so that it displays in a larger pop-up window, do one of the following:

1. Click in the top right-hand corner of the widget.

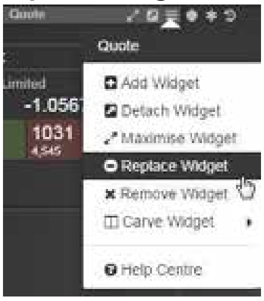
2. Click the widget menu and select **Maximise** Widget.



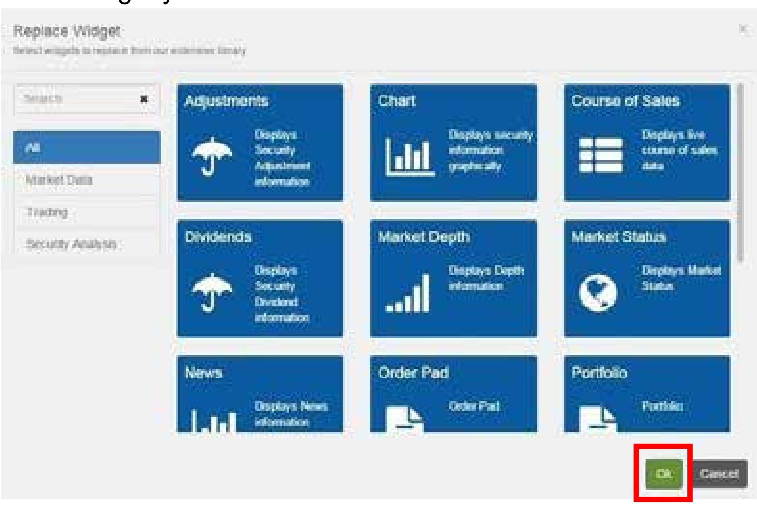
7.6 Replace widgets

To swap out one widget for another in the same widget space, follow the steps below:

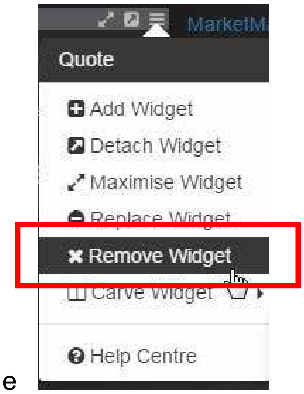
1. Click the widget menu and select **Replace Widget**.



2. On the Replace Widget dialog box, do one of the following:
   a) Search for a specific widget
      If you know the name of the widget you want, you can start typing the widget name into the **Search** bar on the left-hand side of the dialog box. Widgets matching your search criteria display on the right-hand side.
   b) Browse for a widget based on category
      You can click through the widget categories on the left-hand side of the dialog box to view widgets in each category. (**Market Data, Security Analysis**, etc). Or you can click **All** to view all available widgets.
3. Click the button for the widget you want and click **OK**.



7.7 Remove widgets



To remove a widget from a widget space, click the widget menu and select **Remove Widget**.

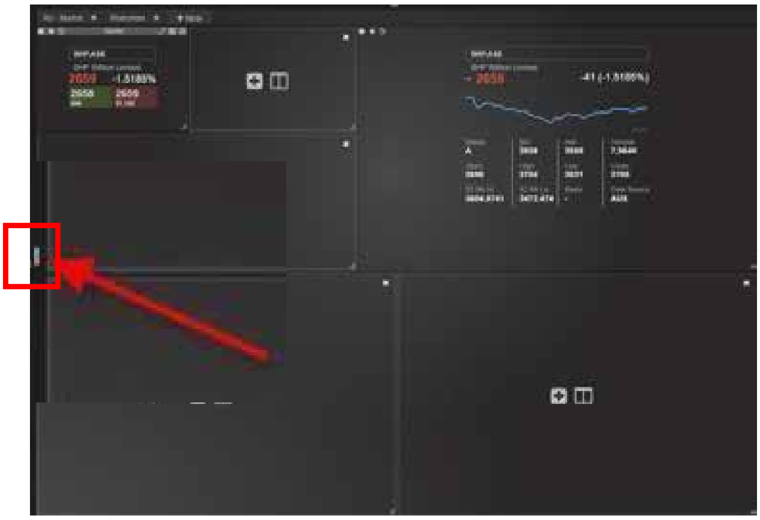
Note: If the removed widget was the only widget in that widget space, the widget space becomes empty. If the widget space contained other widgets as well, then the tab for the removed widget disappears and the other tabs remain.

7.8 Dock widgets

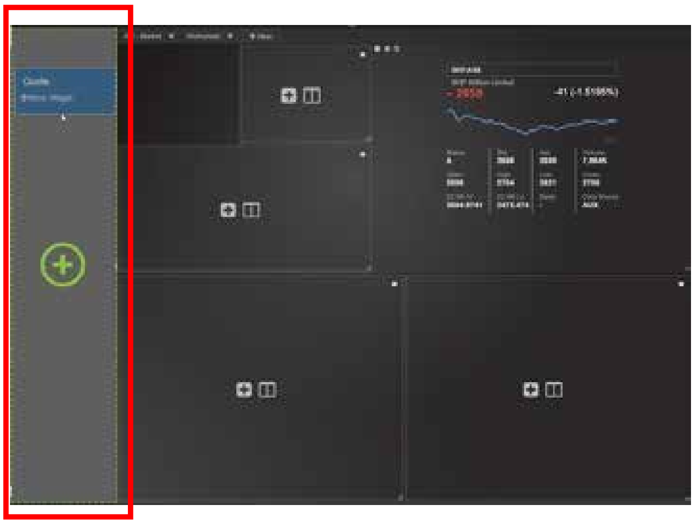
You may want to keep a specific widget in constant view as you work, especially if you are clicking back and forth between different worksheet tabs. To do this, you can "dock" a widget to the left-hand side or top of your screen, which locks that widget into place. This means that the widget always displays in that location, even if you change worksheet tabs. You can also dock multiple widgets in the same space.

7.8.1 Dock a widget on the left-hand side of your screen

1. Click the button on the left-hand edge of the screen. A docked widget space opens on the left-hand side.



2. Click the title bar of the widget you want to dock.
3. Drag the widget on top of the docked widget space. A green dashed line will display around the widget space to indicate where the dropped widget will display.



4. Release the mouse button to drop the widget into the docked widget space.

7.8.2 Dock a widget to the top of your screen

1. Click the button on the top edge of the screen. A docked widget space opens on the top.

2. Click the title bar of the widget you want to dock.
3. Drag the widget on top of the docked widget space. A green dashed line will display around the widget space to indicate where the dropped widget will display.

4. Release the mouse button to drop the widget into the docked widget space.

8.0 Add a Widget from the Widget Library

Widgets are tools that you can use to perform essential tasks like viewing market data and analyzing specific types of information. You can choose from an extensive library of widgets to populate your worksheet. Widgets display in "widget spaces" in your worksheet. You can control your widget spaces by dynamically resizing them or dividing them into smaller widget spaces.

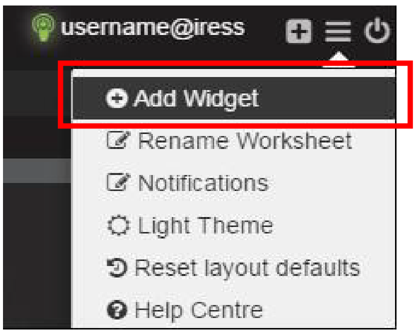
You can add widgets to a widget space in your worksheet from a number of different places:

1. From the application menu
2. From a new worksheet
3. From a blank widget space
4. From the widget menu

8.1 Add a widget to your worksheet

From the application menu

Click the application menu button  and select Add Widget.



From a new worksheet

In a new worksheet, click the Add a widget button.

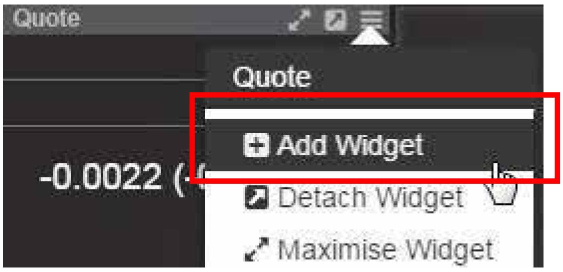
From a blank widget space

Click the + button.

NOTE: If you want to add one of the four most commonly used widgets, click and hold the mouse button to display a wheel containing these widgets, then select the widget you want to add.

From the widget menu

Click the widget menu and select **Add Widget**.



On the **Select Widget** (or **Add Widget**) dialog box, do one of the following:

i. Search for a specific widget

If you know the name of the widget you want, you can start typing the widget name into the **Search** bar on the left-hand side of the dialog box. Widgets matching your search criteria display on the right-hand side.

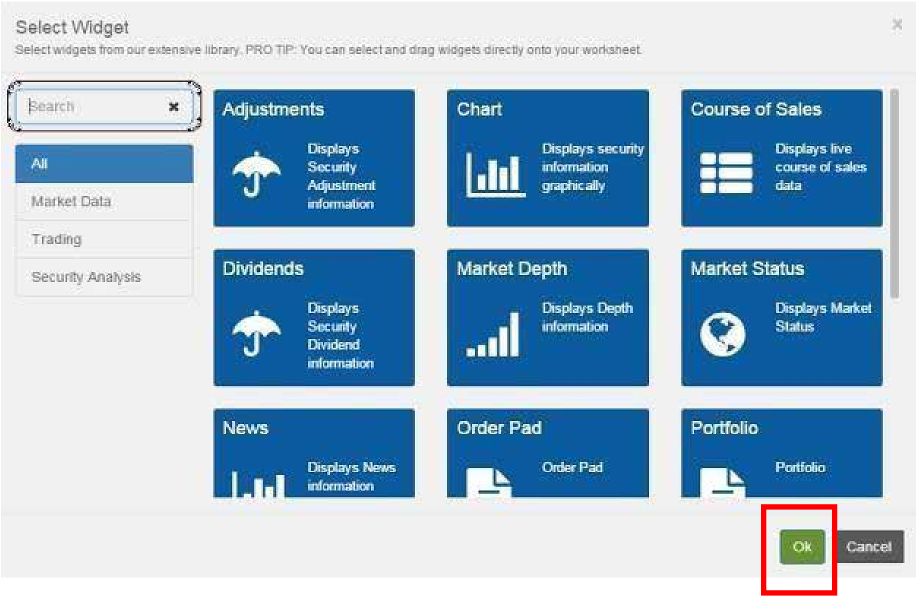
ii. Browse for a widget based on category

You can click through the widget categories on the left-hand side of the dialog box to view widgets in each category (**Market Data**, etc). Or you can click **All** to view all available widgets.

Add the widget to your workspace by doing one of the following:

a) Via mouse click

Click the button for the widget you want, and then click **OK**. You can also double- click the button for the widget you want.



b) Via drag-and-drop

Drag and drop the widget into the applicable widget space in your worksheet. A green dashed line will display around the widget space to indicate where the dropped widget will display.

Note: If you opened the **Add Widget** dialog box from the application menu, you **must** drag and drop the widget into your worksheet.

9.0 Alerts

You can set alert notifications to trigger in response to specific conditions. For example, you can set the following types of alerts:

1. **Quote alerts:** Alerts that notify you when prices, movement or volumes are equal to, greater than or less than specified values
2. **News alerts:** Alerts that notify you when a news announcement is released for a specific security, or when a news story headline contains certain keywords.

A number next to the **Alert Notifications** icon displays the number of new alert notifications you have.

9.1 Create a Quote alert

1. Click 'Set new notification rule'. The Create a notification rule dialog box opens.
2. Click **Quote**.
   a) In the **Security** box, type the security code you want to configure the alert for.
   b) In the **Activity** list, select the specific price, movement, volume or status that you want to configure the alert for.
   c) In the **When** list, select one of the following:
   equals greater than
   greater than or equal to
   less than less than or equal
   to
   d) In the **Value** list, type the relevant value.

9.2 Configure Quote alerts

1. Click **Alert Notifications**  in the top left-hand corner of the application menu bar.
2. Click **Settings**.
3. Select the **reactivation** option. You will be able to select a time frame (eg. Next day, Never, ect).

4. In the **Delivery Method** section, tick one of the following checkboxes:
    - **Within ViewPoint**
    - **As browser alerts**
    - Select a **Play Sound** and/or **email**
    - Click **Save**.

9.3 Modify an existing Quote alert

1. Modify an existing Quote alert by doing the following:

a) Click the Application menu rules tab.

b) Click notifications

c) Click on Quote notification rules.

d) Modify the alert notification rule by hovering over the rule and clicking on

e) Click Save.

2. Temporarily disable an existing Quote alert

You can temporarily disable an existing Quote alert by doing the following:

a) Click the Application menu rules tab.

b) Click notifications

c) Click on Quote notification rules.

d) Untick the rule you would like to temporarily disable.

3. Delete an existing Quote alert

Delete an existing Quote alert by doing the following:

a) Click the Application menu rules tab.

b) Click notifications

c) Click on Quote notification rules.

d) Delete the alert notification by hovering over the rule and clicking on

9.4 Create a News alert

1. Click 'Set new notification rule'. The Create a notification rule dialog box opens.
2. Click **News**.
   a) In the **On** list, select one of the following:

Headline - if you want to create an alert for when a news story headline contains certain keywords.

Security - if you want to create an alert for when a news announcement is related to a specific security.

   b) Do one of the following:

If you selected **Headline**, type the news story headline keywords in the **Value** box.

If you want to include multiple headline keywords, click the symbol once you have set the first news alert If you selected **Security**, type the security code in the **News issued for security** box.

3. Click **Save**.

9.5 Configure News alerts

1. Click **Alert Notifications** in the top left-hand corner of the application menu bar.
2. Click **Settings**.
3. Select the **reactivation** option. You will be able to select a time frame (eg. Next day, Never, ect).
4. In the **Delivery Method** section, tick one of the following checkboxes:
   a) **Within ViewPoint**
   b) **As browser alerts**
   c) Select a **Play Sound** and/or **email**
   d) Click **Save**.

9.6 Modify an existing News alert

1. Modify an existing News alert by doing the following:

   a) Click the Application menu rules tab.
   b) Click notifications
   c) Click on News notification rules.
   d) Modify the alert notification rule by hovering over the rule and clicking on
   e) Click Save.

2. Temporarily disable an existing News alert

You can temporarily disable an existing News alert by doing the following:

a) Click the Application menu rules tab.

b) Click notifications

c) Click on News notification rules.

d) Untick the rule you would like to temporarily disable.

3. Delete an existing News alert

Delete an existing News alert by doing the following:

a) Click the **Application menu** rules tab.

b) Click **notifications**

c) Click on **News notification rules.**

d) Delete the alert notification by hovering over the rule and clicking on .

10.0 Charts

You can create and save charts using the Chart widget. You can also use drawing tools and indicators to customize your charts.

This topic contains the following sections:

- Widget layout
- Display options
- Create a new chart
- Save a chart with a new name
- Open an existing chart
- Save an existing chart with the same name
- Delete an existing chart
- Print a chart
- Chart navigation tools
- Add a drawing tool to your chart
- Delete a drawing tool from your chart
- Hide all drawing tools from your chart
- Delete all drawing tools from your chart
- Add an indicator to your chart
- Show or hide an indicator in your chart
- Delete an indicator from your chart

10.1 Widget layout

The Chart widget is comprised of three sections:

1. Display Options (top)

   The Display Options section consists of buttons that let you change the time interval, the chart style, the chart properties, and the indicators that overlay the chart.

Note: If the Display Options section is not showing, click the button at the top left of the chart widget.

2. Drawing Tools (left)

   The Drawing Tools section consists of buttons that let you add specific drawing tools to your chart.

Note: If the Drawing Tools section is not showing, click the button to the left of the main area of the Chart widget.

3. Chart (main area)

The main area of the Chart widget comprises the actual chart and any indicators you have added.

10.2 Display options

Charts allows you to set the following display options:

1. Modify the time interval for the chart (e.g., 1 minute, 30 minutes, 1 hour, 3 months).
2. Click or to select from a pre-defined list of intervals.
3. Select the chart style (e.g., bars, candles, hollow candles, lines, area, heiken ashi).
4. Modify the chart properties.
5. Add an indicator to your

10.2.1 Create a new chart

1. Open the Chart widget.
2. In the **Code** box, type or select a security code.
3. Use the **display options** to customize your chart as needed.
4. Add **drawing tools** as needed.
5. Add **indicators** as needed.

10.2.2 Save a chart with a new name

1. Click the down arrow next to the **Save** button in the upper right-hand corner of the widget and select **Save As**. The **Save Chart Layout** dialog box opens.
2. In the **Enter Chart Name** box, type a name for your new chart.
3. Click **Ok**.

10.2.3 Open an existing chart

1. Click the **Load** button in the upper right-hand corner of the widget. A drop-down list displays your previously saved charts.
2. Select your previously saved chart.

10.2.4 Save an existing chart with the same name

1. Simply click the **Save** button in the upper right-hand corner of the widget.

10.2.5 Delete an existing chart

1. Click the **Load** button in the upper right-hand corner of the widget. A drop-down list displays your previously saved charts.
2. Click the icon next to the name of the chart you want to delete.

10.2.6 Print a chart

1. Maximise the widget.
2. Using your keyboard, take a screenshot of the widget:
3. **Windows PC users:** Press the **Alt** and **PrtScn** keys simultaneously.
4. **Mac PC users:** Press the **Option** and **F14** keys simultaneously.
5. Paste the screenshot into another application (for example, into an email or Microsoft Word document).
6. Print the screenshot from that application.

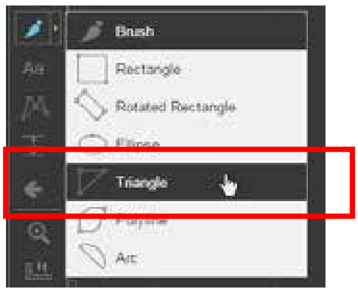
10.3 Chart navigation tools

You can use the row of navigation tool buttons at the bottom of the widget to navigate your chart.

- Click the left and right arrows to scroll to the left or the right, viewing data chronologically.
- Click the - or + buttons to zoom out or in, respectively.
- Click the round arrow icon in the middle to scroll back to the current date and time

10.3.1 Add a drawing tool to your chart

1. If the **Drawing Tools** section is not already showing, click the button to the left of the main area of the Chart widget.
2. In the **Drawing Tools** section, select the button for the drawing tool category, and then select the drawing tool itself.



10.3.2 Customize Your Drawing Tools

1. Customize your drawing tool as needed by using the dialog bar that automatically displays when you add a drawing tool.

Note: The settings included in each dialog bar depend on which drawing tool you selected. For example, for the Triangle drawing tool, you can change the color and width of the line used to make the triangle, among other options.

2. Click and drag your cursor as needed to create the drawing tool on your chart.

10.3.3 Delete a drawing tool from your chart

- Select the drawing tool on your chart.
- In the dialog bar for the drawing tool, click .

10.3.4 Hide all drawing tools from your chart

You can choose to hide all drawing tools in your chart without actually deleting them.

In the **Drawing Tools** section, click **Hide All Drawing Tools**. Click it again to return to showing all drawing tools.

10.3.5 Delete all drawing tools from your chart

In the Drawing Tools section, click Remove All Drawing Tools .

10.3.6 Add an indicator to your chart

1. If the **Display Options** section is not showing, click the button at the top left of the chart widget.
2. In the **Display Options** section, click .
3. Select the indicator that you want to add to the chart.

10.3.7 Show or hide an indicator in your chart

Click **Show/Hide** next to the name of the indicator you want to show or hide. Click it again to undo your action.

10.3.8 Delete an indicator from your chart

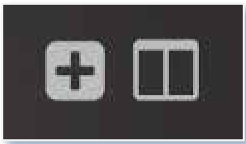
Click Delete next to the name of the indicator you want to remove.

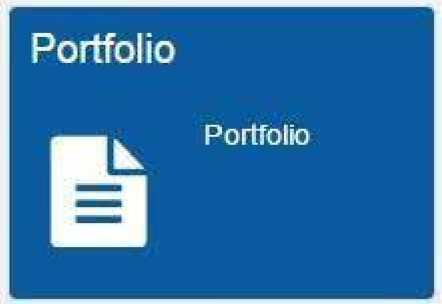
11.0 Portfolio

11.1 Accessing Portfolio Widget

1. In a new worksheet, click the **Add a widget** button.

2. Click the **+** button.





3. Select the **Portfolio** widget.
4. Select **OK**.

11.2 Navigating Portfolio

11.2.1 Portfolio summary view

1. Click on the **portfolio summary** view button.

2. The summary view displays:

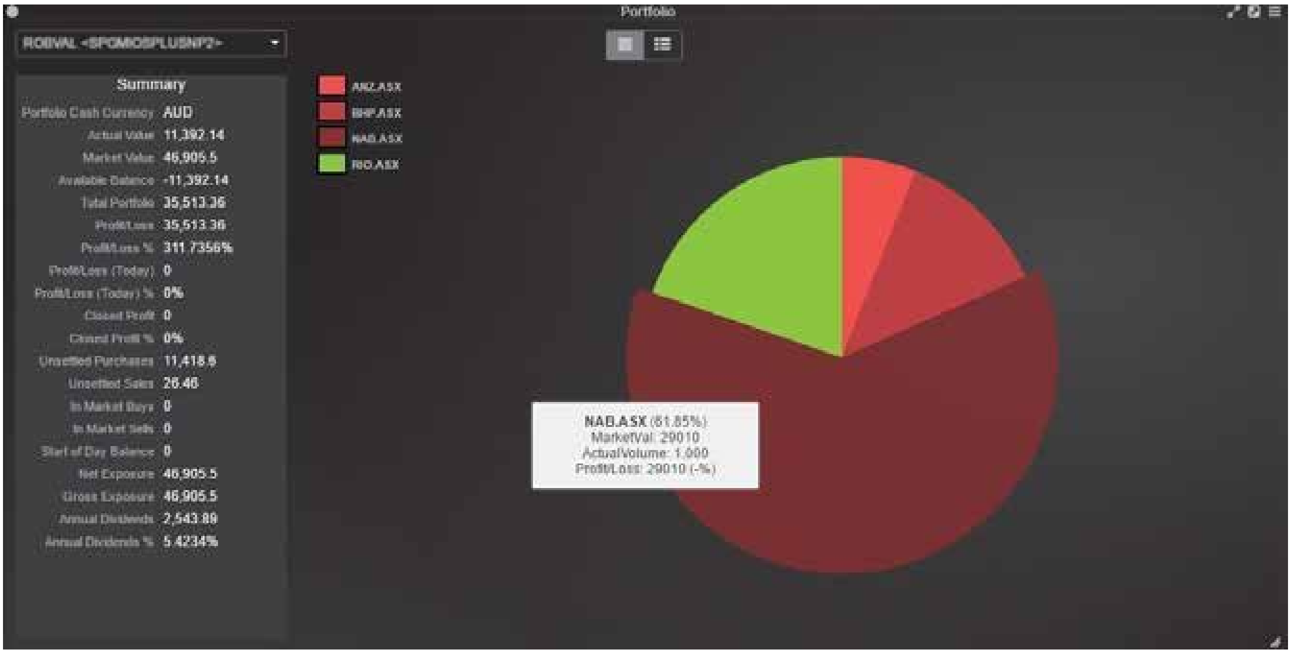
   a) A **summary overview**

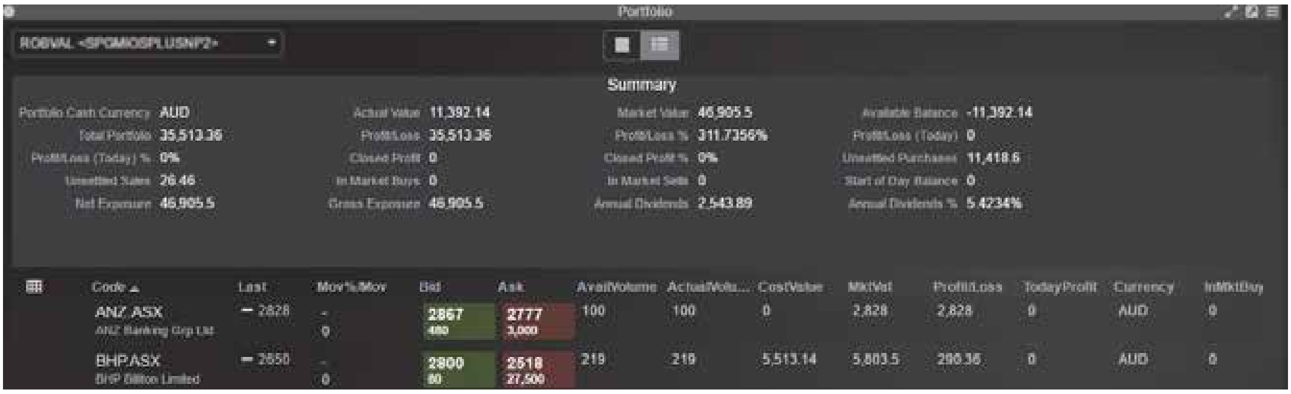
   b) **Graphical representation** (pie chart) of holdings in the portfolio

3. The segments of the pie chart are **interactive**.

   Click on the slice to get detail

4. To view more detail per segment, left mouse click on the slice.
5. To click through to the detail view, double click on the slice.


Portfolio
ROBVAL <SPOMOSPLUSNP2>
Summary
Portfolio Cash Currency AUD
Actual Value 11,392.14
Market Value 46,905.5
Available Balance -11,392.14
Total Portfolio 35,513.36
Profit/Loss 35,513.36
Profit/Loss % 311.7356%
Profit/Loss (Today) 0
Profit/Loss (Today) % 0%
Closed Profit 0
Closed Profit % 0%
Unsettled Purchases 11,418.6
Unsettled Sales 26.46
In Market Buys 0
In Market Sells 0
Start of Day Balance 0
Net Exposure 46,905.5
Gross Exposure 46,905.5
Annual Dividends 2,543.89
Annual Dividends % 5.4234%
ANZ.ASX
BHP.ASX
NAB.ASX
RIO.ASX
NAB.ASX (61.85%)
MarketVal: 29010
ActualVolume: 1,000
Profit/Loss: 29010 (-%)


Portfolio
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Code Last Mov%/Mov Bid Ask AvailVolume ActualVolu... CostValue MktVal Profit/Loss TodayProfit Currency InMktBuy
ANZ.ASX ANZ Banking Grp Ltd 2828 - 0 2867 480 2777 3,000 100 100 0 2,828 2,828 0 AUD 0
BHP.ASX BHP Billiton Limited 2650 - 0 2800 80 2518 27,500 219 219 5,513.14 5,803.5 290.36 0 AUD 0

11.2.2 Portfolio summary view

1. Click on the portfolio detailed view button.

2. The detailed view displays:
   a) A summary overview (same as what is displayed in summary view).
   b) Current portfolio position per individual security.

To sort ascending / descending click on the column heading.

11.3 Configuration

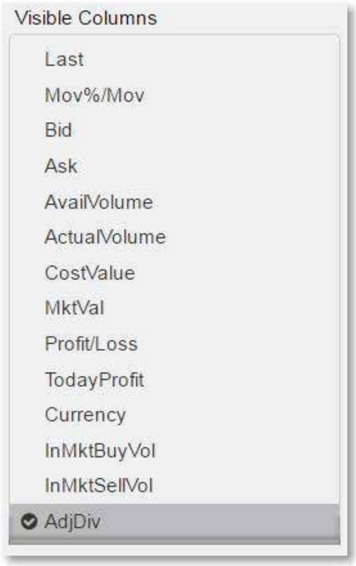
11.3.1 Configure Column Preferences

1. Click the configuration menu on the left hand corner of the heading row. The Configure Table dialog box opens. 

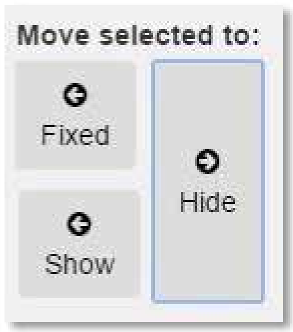
2. Do one of the following

a) **Hide Visible Columns**

In the **Visible Columns** section, select the columns that are to be hidden i.e. **AdjDiv**. A checkmark displays on the left hand side of the column, indicating it has been selected.



Click **Hide**. The column moves to the Hidden Columns section, and will no longer display in the Portfolio widget.



b) **Show Hidden Columns**

To show hidden columns apply the same process, clicking on **Show**.

c) **Change the Order of Columns**

To change the order in which the columns display, select column names and click up or down arrows until the order is correct.

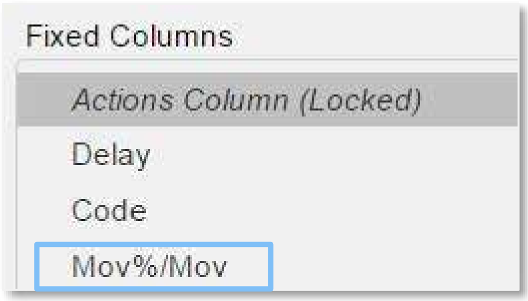
d) **Set Fixed Columns**

Set specific columns as fixed to keep them visible while scrolling.

Select the column name i.e. **Mov% / Mov.**

Click **Fixed**.

The selected column will appear under **Fixed Columns**.



e) Reset the Columns to the Default Display

To resent the columns back to default display, click **Reset Columns**.

3. Click **Save Changes**.

11.4 Portfolio Values

11.4.1 Portfolio summary values and descriptions

Field	Definition
Actual Value	Total value of the portfolio at entry price.
Annual Dividends	Total of the dividends paid on each holding in the selected portfolio.
Annual Dividends %	Total of the dividends paid on each holding in the selected portfolio, expressed as a percentage of the profit and loss.
Available Balance	The equity available in the portfolio for placing buy orders in the market.
Closed Profit	Total of profit or loss from each closed position for the day.
Closed Profit %	Percentage of closed profit and loss on cumulated profit and loss.
Gross Exposure	Total exposure value for all positions displayed, expressed in the base currency.
GLV	This is the NAV (Net Asset Value) of the selected derivative holding.
In Market Buys	The total value of buy orders currently open in the market. This includes buy orders created in all of the accounts assigned to the portfolio.
In Market Sells	The total value of buy orders currently open in the market. This includes sell orders created in all of the accounts assigned to the portfolio.
Market Value	Current market value of the selected portfolio.
Net Exposure	Net exposure of the selected portfolio.
Portfolio Cash Currency	The currency of the cash position.
Profit/Loss	Total gains/losses across the selected portfolio based on the average execution price.
Profit/Loss %	The percentage of the profit/loss across the selected portfolio, based on market value.
Profit/Loss (Today)	Total gains/losses across the selected portfolio for the current day.
Profit/Loss (Today) %	The current day's profit/loss, expressed as a percentage of the overall profit/loss.
Start of Day Balance	The cash balance loaded start of day.
Total Portfolio	This is the NAV (Net Asset Value) of the selected equity portfolio.
Unsettled Option Buy	Total unsettled value of option buy trades.
Unsettled Option Sell	Total unsettled value of option sell traded.

Please note that the portfolio summary fields includes internationally applicable fields.

11.4.2 Portfolio holdings values and descriptions

Column	Description
ActualValue	The value of your position based on entry price or average execution price.
ActualVolume	The current shares held in that position.
AdjDiv	Adjusted annual dividend rate.
AnnDiv	The annual dividend amount for the holding.
Ask	Live best market sell price.
AvailVolume	Number of shares held, excluding untraded volume in the market.
AvBuyPrice	Average buying price of shares bought for the current days trading.
AvSellPrice	Average selling price of shares sold for the current days trading.
AvPriceToday	Average price per share for the current day's trading.
Bid	The current best buying price for the instrument.
Ccy	Quoted currency for the security held.
CcyMult	Currency multiplier for the security. This value, when multiplied by the price, will convert the price into a value in the relevant currency.
Code/Desc	Security, exchange code and short description of the security held.
CollVolume	Collateral volume.

CostValue	Value of the holdings for the security, displayed in quoted security currency.
Delay	The number of minutes quote data is delayed. A dash (-) indicates quote data is live.
FXRate	Rate to convert between the security currency and portfolio's base currency.
HistPrice	The entry price of the derivative holding.
HistProfit	Historical profit or loss of derivative position as of start of day. This excludes current day profit or loss.
InitialMargin	Current margin being held on the derivative holding.
InMktBuyVol	Total volume of buy orders currently open in the market.
InMktSellVol	Total volume of sell orders currently open in the market.
Last	Last traded price of the instrument held

Margin%	Initial margin percentage used to calculate the cash requirement to purchase a derivative security. This is only used when trading derivative instruments. These percentages are maintained by your broker
MarketVal	Current value of the holding
Mov% / Mov	Current day's instrument movement, listed both as a percentage and in units for the held position
NetExposure	Net exposure
PrevClose	Previous day's closing price of the instrument held
Profit/Loss	Total profit and loss of the holding
RealProfit	Traded profit or loss of a derivative holding for the day
SFCVarMgn	Difference between the initial margin at the time the position was opened and the current initial margin. This value only calculates for securities on the SFC exchange
Src	The source code for the quoted market data of the instrument held
TodayProfit	Profit and loss for the current trading day of the holding. This is calculated based on the previous day's closing price of the instrument held
TotHisProfit	This is the total profit and loss of a derivative position since the position was held. This calculation may differ per broker due to entry price calculations. This calculation does not apply to equity positions. Refer to the Total Profit for equity holdings
UnrealProfit	Profit or loss on open derivative positions

12.0 Pricing

12.1 Quote and Watchlist

12.1.1 Quote

The Quote widget displays live, dynamic pricing information quotes on securities, indices and currencies.

12.1.2 Widget layout

For a complete list of field definitions, see Field Definitions – Quote.

12.1.3 View ad-hoc price quotes

1. Open the Quote widget.
2. In the **Code** box, type in a security code and press **Enter**.

12.1.4 Field Definitions – Quote

The Quote widget displays detailed information about a particular security.

Field	Definition
52 Wk Hi	Highest price at which a security has traded during the previous 52 weeks.
52 Wk Lo	Lowest price at which a security has traded during the previous 52 weeks.
Ask	Live best market sell price.
Bid	Live best market buy price.
High	Highest trade price for the current day.
Low	Lowest trade price for the current day.

Open	Current day's opening price or value.
PrevClose	Previous day's closing price or value.
Volume	Volume traded for the current day.

12.2 Watchlist

You can create your own user watchlists, but you can also use pre-defined system Watchlists.

12.2.1 Widget layout

For a complete list of field definitions, see Field Definitions – Watchlist. This topic covers all of the following:

- Configure the Watchlist widget
- Create a user watchlist
- Retrieve a user watchlist
- Retrieve a pre-defined system watchlist
- Manage a user watchlist
- Delete a user watchlist

12.2.2 Configure the Watchlist widget

Click in the left-hand corner of the heading row for the list of securities. The **Configure Table** dialog box opens.

Do one of the following:

1. Show Hidden Columns
    - In the **Hidden Columns** section, select the columns that you want to show. A checkmark displays next to each selected column.
    - Click **Show**. The columns move to the **Visible Columns** section, and will now display in your Watchlist widget.

2. Hide Visible Columns
    - In the **Visible Columns** section, select the columns that you want to hide. A checkmark displays next to each selected column.
    - Click **Hide**. The columns move to the **Hidden Columns** section, and will no longer display in your

Watchlist widget.

3. Change the Order of Columns
   - To change the order in which columns display, select column names and click or until the column names are in the correct order.

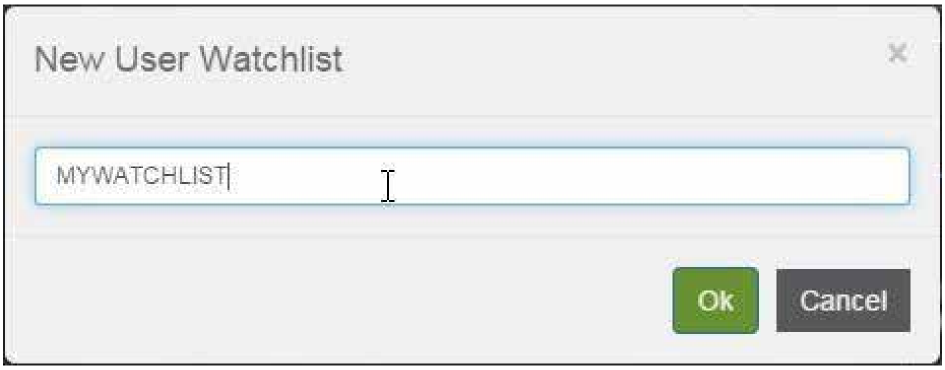
4. Set Fixed Columns

   You can set specific columns as “fixed” to keep them visible while you scroll.
   - To set columns as fixed, select the column name and click **Fixed**.

5. Reset the Columns to the Default Display
   - To reset the columns back to the default display, click Reset Columns.
   - Click Save Changes.

12.2.3 Create a user watchlist

1. Open the Watchlist widget.
2. In the **Code** box, type in a security code. Repeat this step until you have the selection of security codes you want to save as a watchlist.
3. Click **Save** (or the button, depending on the size of your widget) in the top right-hand corner of the widget. You could also select the drop-down arrow and select **Save As**. The **New User Watchlist** dialog box opens.
4. Type the name for your user watchlist.



5. Click **Ok**. Your watchlist name displays with a $ in front of it, which indicates that it is a user watchlist as opposed to a system watchlist. User watchlists are associated with the user’s login name, and are available each time the user who created them logs in (regardless of the PC being used).

12.2.4 Retrieve a User Watchlist

You can retrieve one of your user watchlists either by searching for it using the **Code** box, or by browsing through your list of user watchlists.

1. Search for a user watchlist
    - Open the Watchlist widget.
    - In the **Code** box, type the name of your user watchlist (e.g., **MYWATCHLIST**).
    - Select your watchlist from the search results. Your watchlist name displays with a $ in front of it, which indicates that it is a user watchlist as opposed to a system watchlist. User watchlists are associated with the user's login name, and are available each time the user who created them logs in (regardless of the PC being used).

2. Browse user watchlists
    - Open the Watchlist widget.
    - Click **Load** (or the button, depending on the size of your widget) in the top right-hand corner of the widget. The **Existing Watchlists** list displays.
    - In the **Existing Watchlists** list, select a user watchlist.

12.2.5 Retrieve a Pre-Defined Watchlist

- Open the Watchlist widget.
- In the **Code** box, type **/** and select **Watchlists**. A list of pre-defined system watchlists display.

- Select a watchlist name.

12.2.6 Manage a user watchlist

Open the Watchlist widget and retrieve a user watchlist.

Configure the watchlist by doing any of the following:

1. Add securities
   - In the **Code** box, type a security code.
   - Press **Enter**. The security is added to the watchlist.
   - Repeat steps for all securities you want to add.

2. Remove individual securities
   - Click the inline action menu next to the security code that is to be removed from the watchlist.
   - Select Remove.
   - Repeat steps I and ii for all securities you want to remove.

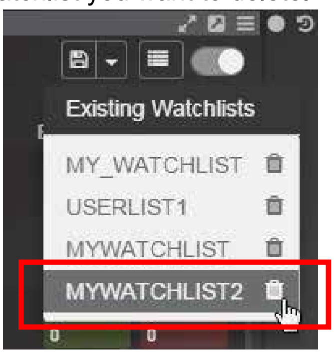
3. Remove all securities
   - Click the **Clear** button.

4. Auto-save changes to a watchlist
   - If you want your changes to save automatically as you work on a watchlist, slide the auto-save button to the right. The auto-save button is located in the top right-hand corner of the widget.

12.2.7 Delete a user watchlist

Note: You can only delete user watchlists, not pre-defined system watchlists.

1. Open the Watchlist widget.
2. Click **Load** (or the button, depending on the size of your widget) in the top right-hand corner of the widget. The **Existing Watchlists** list displays.
3. Click the button next to the user watchlist you want to delete.



4. The **Delete watchlist** dialog box opens.
5. Click **Yes**.

12.3 Field Definitions – Watchlist

The Watchlist widget displays detailed information about a particular security or watchlist.

Field	Definition
52WkHi	Highest price at which a security has traded during the previous 52 weeks.
52WkLo	Lowest price at which a security has traded during the previous 52 weeks.
Ask	Live best market sell price.
Basis	A security's basis of quotation. Possible values include: XD – Ex-Dividend CD – Cum-Dividend
Bid	Live best market buy price.
Chg%/Chg (orMov%/Mov, in some regions)	Current day's movement, listed both as a percentage and in units.
Code/Desc (orSymbol/Desc, in some regions)	Exchange code and short description for the security or instrument.
DivAmnt	Dividend amount.
DivHist	Historical dividend amount.
High	Highest trade price for the current day.
Last	Live last traded price.
Low	Lowest trade price for the current day.
MktCap	Total market value

Field	Definition
MktVol	Volume of shares traded during cash open time of market.
MktVal	Market value. Value of the shares traded during market hours.
MktVWAP	Market Volume Weighted Average Price (VWAP).
MPrc	Match Price. Price at which the maximum volume of orders can be executed at the time of an auction.
Mvol	Match Volume. Volume of shares matched during pre-open market times (including closing auction).
Open	Current day's opening price or value.
P/E	Price/Earnings ratio, which is the ratio of a company's share price to its per-share-earnings.
Prev	Previous day's closing price or value.
Status	Trading status of the security.

Symbol/Desc (orCode/Desc, in some regions)	Exchange code and short description for the security or instrument.
Value	Value traded for the current day.
Volume	Volume traded for the current day.
VWAP	Volume weighted average price of the security.
YldHist%	Historical yield percentage.

13.0 Trading

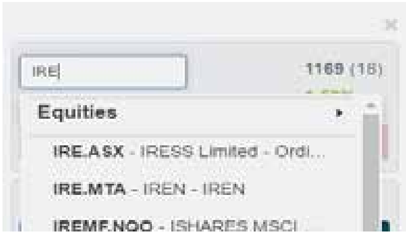
13.1 Placing Order

There are multiple ways that an order entry ticket can be launched to place a trade. Below outlines all the methods of being able to launch an order entry ticket.

13.1.1 Using the Buy / Sell buttons

1. Launch the order entry screen buy selecting either the **Buy** or **Sell** button (located on the top right hand side of the application menu bar).

2. The order entry ticket will launch unpopulated.
3. Select the relevant trading account.
4. Search and select the security to trade i.e. **IRE.ASX**



5. Complete the order by inputting the volume of the trade, the order type, the price and the lifetime.

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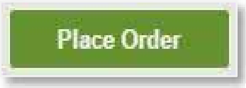
6. Review the order **Summary** to confirm that the order details are correct.

7. Click **Place Order** to submit order to the market.



13.1.2 In-line action menu

This method pre-populates the order entry ticket with the security code and order price information.

The following widgets incorporate a built in shortcut to launch the order entry screen:

- Watchlist widget
- Market depth widget
- Portfolio widget

From the Watchlist widget

1. To place an order click on the **in-line action** menu next to the security of interest.

2. Select either **Buy** or **Sell** to launch the order ticket.

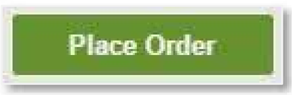
3. Input relevant parameters account, volume, order type, order price and order lifetime parameters.
4. Review order **Summary**.
5. Click **Place Order** to submit order.

From the Portfolio widget

1. To place an order click on the **in-line action** menu next to the holding of interest

2. Select either **Buy** or **Sell** to launch the order ticket

3. Complete account, volume, order type, order price and order lifetime parameters
4. Click **Place Order** to submit order



From the Market Depth widget

1. To place an order click on the **in-line action** menu.
2. Select either **Buy** or **Sell** to launch the order entry ticket.

3. Complete account, volume, price and order lifetime parameters.
4. Click **Place Order** to submit order.

13.1.3 Trading from the Bid / Ask

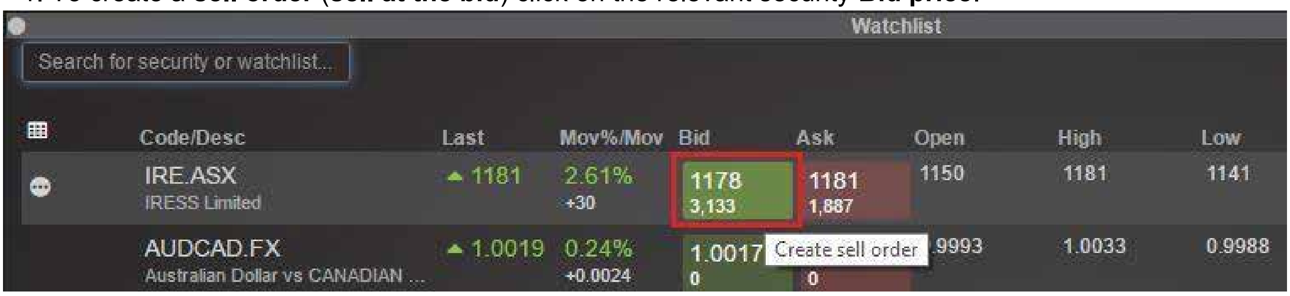
This method pre-populates the order entry ticket with the security code and order pricing information.

The following widgets incorporate a built in shortcut from the Bid and Ask to launch the order entry screen:

- Watchlist widget
- Market depth widget
- Portfolio widget

From the Watchlist widget

1. To create a **sell order** (**sell at the bid**) click on the relevant security **Bid price**.



To create a **buy order** (**buy at the offer**) click on the relevant security **Ask price**.

3. Complete account, volume, order type, order price and order lifetime parameters.
4. Review order **Summary**.
5. Click **Place Order** to submit order.

From the Market depth widget

1. To create a **sell order (sell at the bid)** click on the relevant security **Bid price.**
2. To create a **buy order (buy at the offer)** click on the relevant security **Ask price.**

3. Complete account, volume, order type, order price and order lifetime parameters.
4. Click **Place Order** to submit order.

From the Portfolio widget

1. To create a **Sell order** (**sell at the bid**) click on the relevant security **Bid price**.
   To create a **Buy order** (**buy at the offer**) click on the relevant security **Ask price**.

3. Input relevant parameters within the order pad.
4. Click **Place Order**.

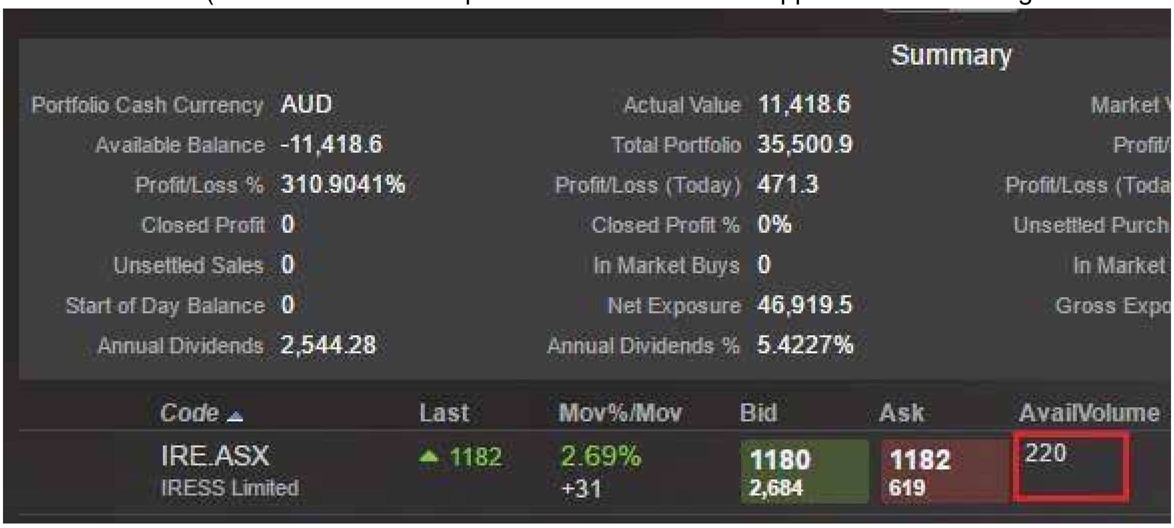
This is a quick method to easily increase or decrease a holding

13.1.4 Trading from Available Volume in the portfolio

A contra order or equal and opposite order ticket to the holding is loaded with the security, volume and price pre-populated. This method is an effective way of closing out a position as the order details are prepopulated

From the Portfolio widget

1. Click **AvailVolume** (**available volume** to place an order that is the opposite of the holding.



2. Order volume will be pre-populated with the Available Volume.

3. Order price will pre-populate with either the current Bid price or Ask price depending on whether the position is long or short.
4. Review order **Summary**.
5. Click **Place Order** to submit order.

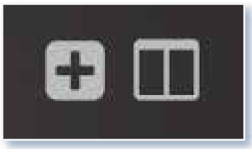
This method is an efficient way to quickly close out a holding

13.2 Managing Orders

13.2.1 Accessing the Order Pad widget

1. In a new worksheet, click the **Add a widget** button.

2. Click the + button.



3. Select the **Order Pad** widget.
4. Select **OK**.

13.2.2 Order pad Filtering

Filter order pad view by either account, group or timeframe.

Filter by Account

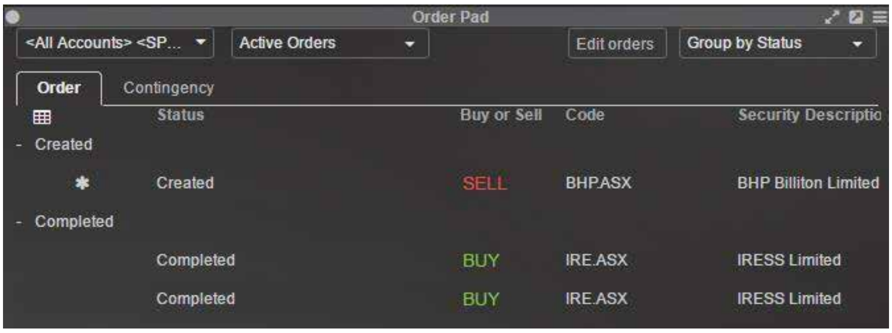
1. Select the Account drop down and select the relevant accounts.

Filter by Grouping

1. On the right hand side of the Order pad select the appropriate grouping view:

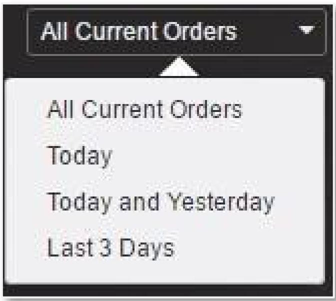
- ☐ **Group by Account**: groups orders per trading account

- ☐ **Group by Status**: groups orders per order status



Filter by order history

1. Within the Order pad select the All Current Orders drop down menu:

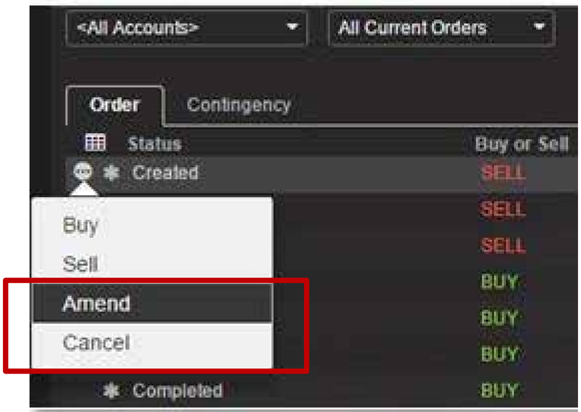


- All Current Order: displays all active orders
- Today: displays all orders placed today
- Today and Yesterday: displays all orders placed today and yesterday Last 3 Days: displays all order placed in the last 3 days

Order history is limited to 3 days, if you require more, contact your broker.

13.2.3 Amend/Cancel an active order

1. Click the in-line action menu against the relevant order.
2. Select Amend or Cancel.



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14.0 Market Depth

“Depth” is the term given to the price feed that details all the bids (buy orders) and asks (sell orders) in the market for a given security. The information available is the price the traders want to trade at and the corresponding volume that is to be purchased or sold. Depth can also be referred to as the “depth of market.”

14.1 Widget layout

The Depth widget is comprised of two sections:

- Quote section (top right)
  The **Quote** section displays live quote information about the security.
- Depth section (bottom)
  The **Depth** section displays the bids and asks in the market for the security, with the latest bid and ask in the top row.

14.2 Display options

Consolidated View - The Consolidated View displays consolidated values for bids and asks at each price

Detailed View - The Detailed View displays details of individual bids and asks rather than Cumulative value, for each price level.

14.2.1 Market Depth – Consolidated View

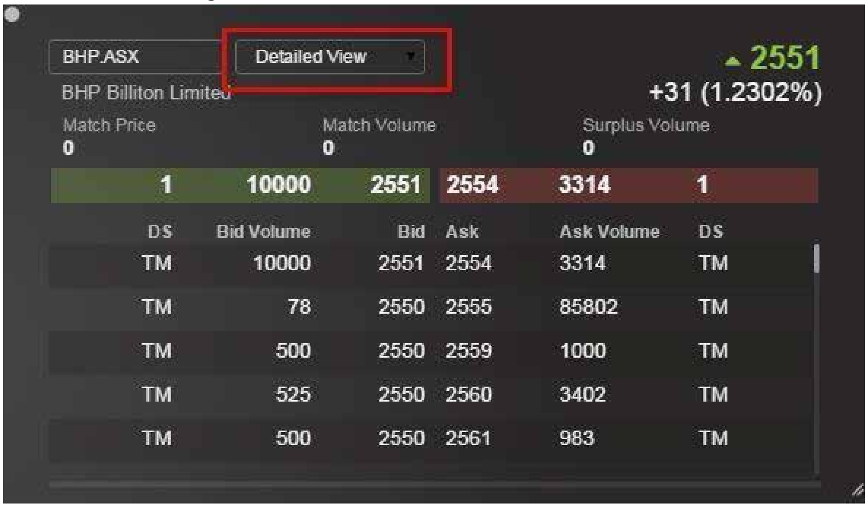
The Consolidated View displays consolidated values for bids and asks.

1. Open the Market Depth widget.
2. In the drop-down list to the right of the **Code** box, select **Consolidated View**.

14.2.2 Market Depth – Detailed View

The Detailed View displays details of individual bids and asks rather than cumulative values for each price level.

1. Open the Market Depth widget.
2. In the drop-down list to the right of the **Code** box, select **Detailed View**.



14.3 Field Definitions – Market Depth

The Market Depth widget displays detailed information about a particular security.

Quote section

The **Quote** section in top right-hand corner of the Market Depth widget displays the live price quote and movement indicator for the security.

Bids section

Field	Definition
#	Number of buyers at the corresponding bid price. **Note:** This field is only available in Consolidated View.
Bid	Buy price. Click this value to open the Order Entry ticket with a buy order at this price.
Bid Volume	Volume on offer at the corresponding bid price.
DS	Data source. A code representing the source of the security information.

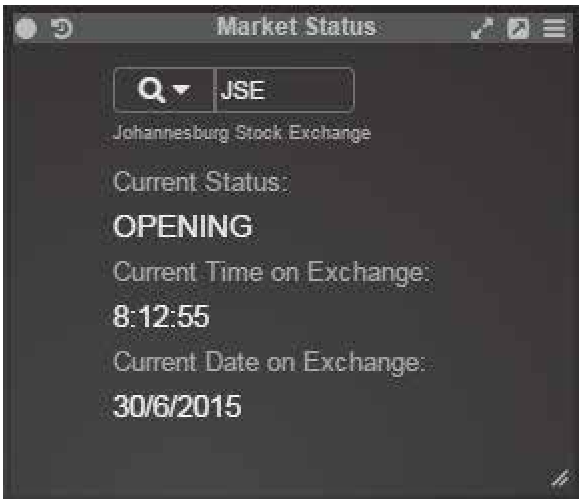
Asks section

Field	Definition
#	Number of sellers at the corresponding ask price. **Note:** This field is only available in Consolidated View.
Ask	Sell price. Click this value to open the Order Entry ticket with a sell order at this price.
Ask Volume	Volume on offer at the corresponding ask price.
DS	Data source. A code representing the source of the security information.

15.0 Market Status

The Market Status widget displays current status information for available exchanges that support time and status reporting. Market status data includes the following:

- exchange code
- time according to the exchange
- date according to the exchange
- current status of the exchange



16.0 News

The News widget provides access to live company reports and general world news. The widget includes a list of news headlines and relevant securities, as well as the first few words of each article. An asterisk displays next to a news story if the relevant security is held in your portfolio, indicating the news story may be of importance to you. You can click each headline to display the full news story in a new window.

Note: Not all news headlines have a news story attached. If your cursor changes to a hand icon when you hover over the news headline, that means the headline is clickable.

16.1 Widget layout

The News command displays news headlines in descending order, with the most recent news story at the top of the list.

16.2 View a story

Click a headline to display the story in a new window.

Once you have read the story, click the located in the top right-hand corner of the story window to close it.

16.3 Create a News Alert

You can create alert notifications to notify you whenever a news announcement is released for a specific security, or whenever a news story headline contains certain keywords.

16.4 Drag and Drop

You can type a security code into the news widget or simply drag and drop a security code. This will filter the news per the security that was specified.