

FINECO

F I N E C O X

**The best
and easy-to-use tools**

FINECOX

1 INTRODUCTION	2
1.1 GENERAL PRESENTATION.....	2
1.2 DATA SHEET.....	2
2 TIPS & TRICKS	3
2.1 MAIN MENU	3
2.2 WORK SCREENS OR WORKSPACE.....	4
2.3 CUSTOMISING THE INTERFACE.....	4
2.4 SEARCHING FOR A SECURITY.....	5
2.5 PLACING AN ORDER	5
2.6 LINKING SEVERAL MODULES AND OTHER FUNCTIONS.....	6
3 FUNCTIONS.....	7
3.1 THE UPPER SECTION.....	7
a) Workspace.....	7
b) Settings.....	7
c) Component library	7
d) Account page.....	8
e) Add new workspaces.....	9
f) Security search	9
g) Logout.....	9
3.2 THE PLATFORM WORKSPACE	10
a) Portfolio:	10
b) Orders monitor.....	11
c) Stocklist	13
d) Watchlist.....	14
e) News.....	16
f) Product details.....	17
h) Chart.....	19
i) Links between components	19
4. PLACING ORDERS	20
A) MINITICKET	20
B) BOOK	21
C) CHART TRADING.....	24
D) ORDERS WITH CONDITIONS AND ALERTS.....	25
E) WARNINGS	26
5. CHARTS.....	26

1 INTRODUCTION

1.1 General presentation

FinecoX is the trading platform developed by Fineco that stands out for its customisation, advanced functionality, rapidity of information and operational completeness.

The data are strictly real-time push (if push is enabled for the market in question). Trading is available on all equities, ETFs, Certificates and Turbo Certificates, Options, Knock Outs and Daily Options, CFDs and Forex, Futures, Bonds and Covered Warrants.

The structure of FinecoX is designed to allow you to visualise much more data at a glance. It is fully customisable and you can simultaneously view watchlists, charts, news, your portfolio and order monitor and always have your profits and losses under control, even on a daily basis.

1.2 Data sheet

Below are the suggested IT requirements for using the FinecoX platform to its full potential:

Chrome: 85.0

Opera: 70.0

Edge: 85.0

Firefox: 80.0

Safari: 14.0.2

At least 8 GB of RAM is recommended.

At least an Intel i5 / AMD Ryzen 5 processor (equivalent or higher) is recommended.

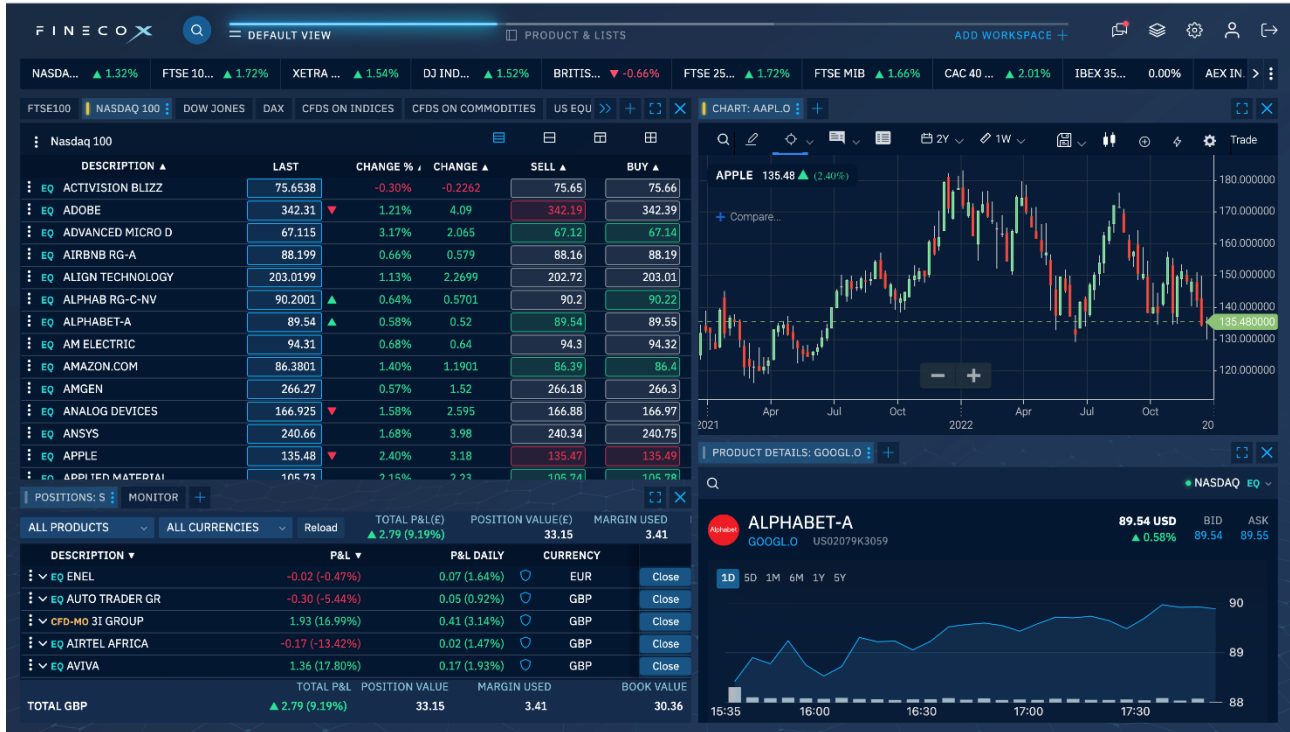
Stable, high-performance internet connection.

Minimum resolution FHD.

The platform is to be used in a single browser session.

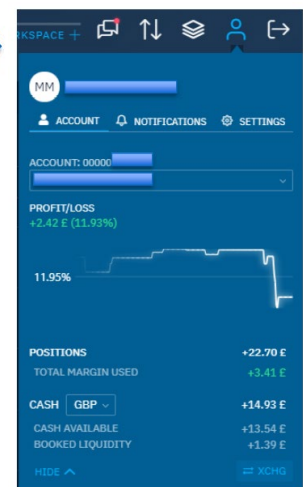
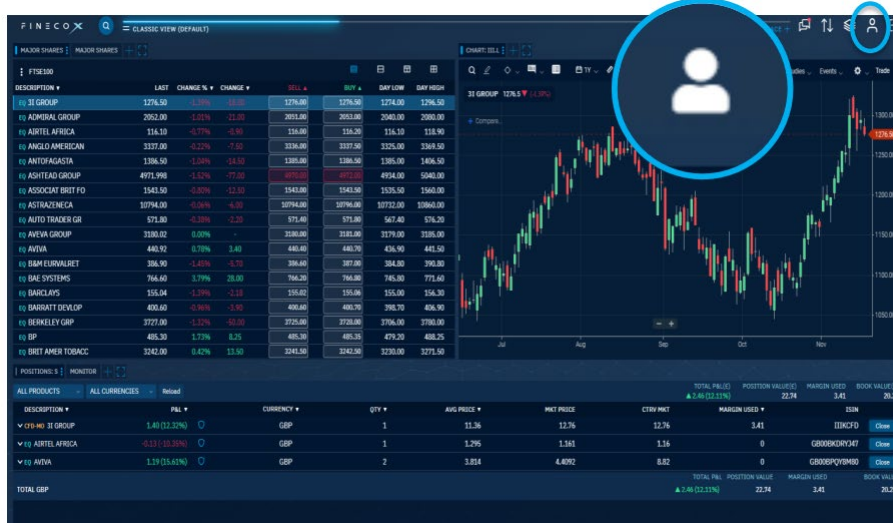
2 TIPS & TRICKS

Below is a short introductory tutorial. We'll show you the main functions of the FinecoX platform in just a few steps.



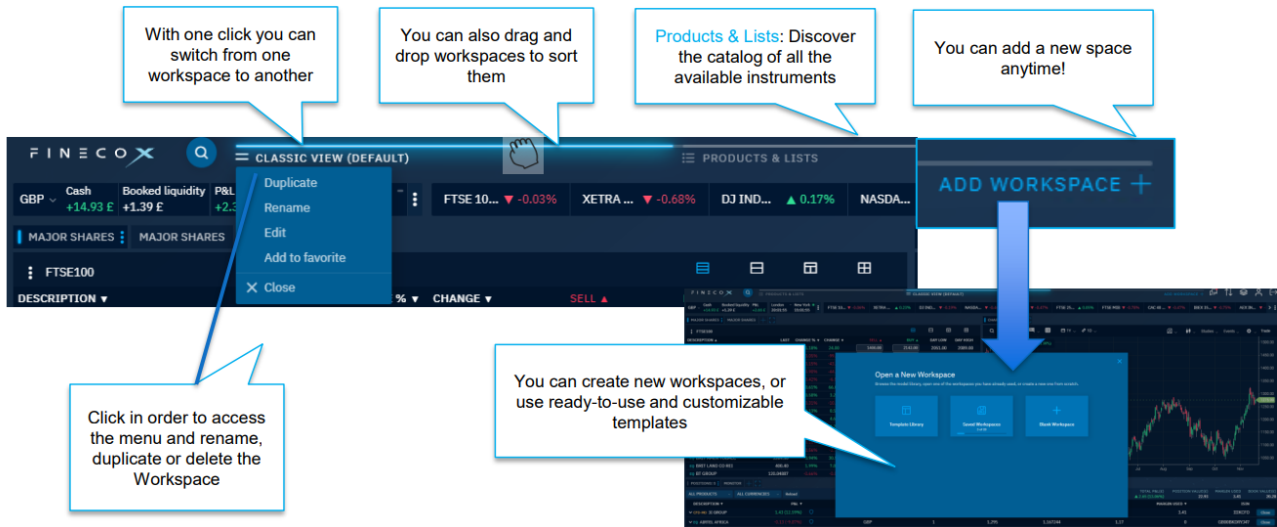
2.1 Main menu

In the top right section of the platform there are sections to manage the account, set preferences and customise the platform, or to check notifications.



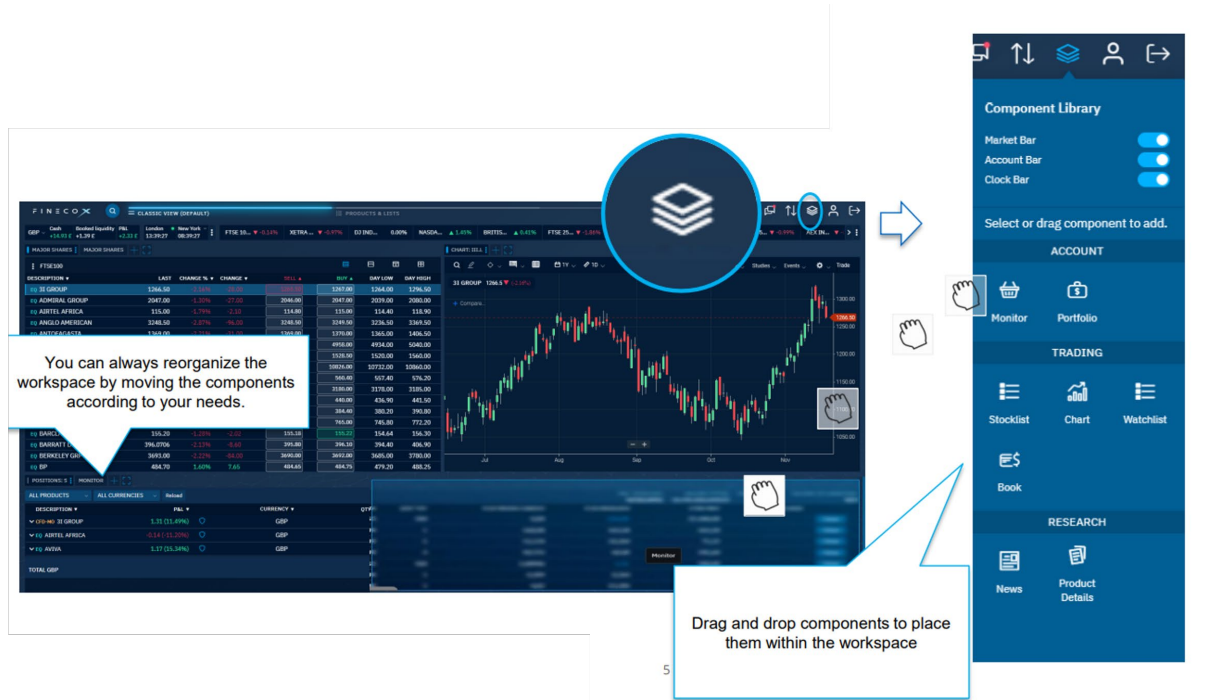
2.2 Work screens or Workspace

Fineco X offers a preconfigured workspace, but it's possible to add others or create new ones by inserting your favourite components.



2.3 Customising the interface

Using the side menu, you can customise your workspace, adding the components you're interested in and positioning them as you like.



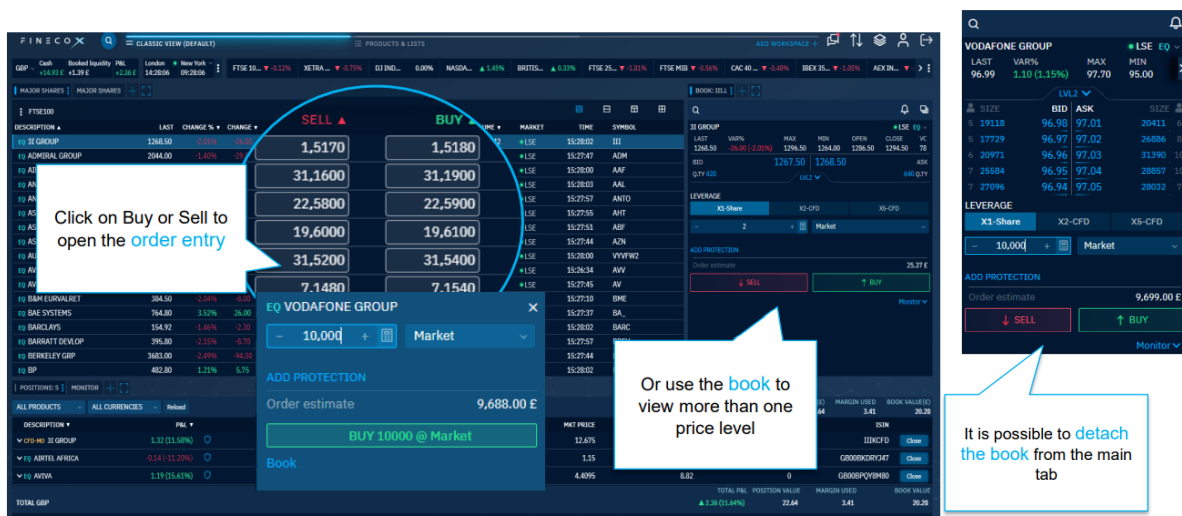
2.4 Searching for a security

Using the magnifying glass at the top left, it's possible to search for a security, access its main information and place an order directly. In the search section it's also possible to access the Product Catalogue, i.e. a section showing all the instruments available on the platform.



2.5 Placing an order

FinecoX allows orders to be entered with three main forms: book, miniticket and chart. It's also possible to activate the "One click trade" setting from the menu in the top right-hand corner to place one-click orders without having to enter your PIN.



2.6 Linking several modules and other functions

All components are customisable and offer various functions, which can be accessed by clicking on the three vertical dots or using the right button. It's also possible to link several components together by assigning them a colour. By linking a favourite list to a chart, a book and an instrument card (assigning all four components the same colour) you'll be able to load the chart, book and instrument card of a particular security with a single click on the security in the watchlist you're interested in.

The screenshot shows the FINECOX interface with several components highlighted by callouts:

- Select Channel:** A callout pointing to the 'Select Channel' button in the top left corner.
- Select view:** A callout pointing to the 'Select view' button in the top left corner.
- Open in Browse Products:** A callout pointing to the 'Open in Browse Products' button in the top left corner.
- Close Component:** A callout pointing to the 'Close Component' button in the top left corner.
- Click on the header to select additional features or to close the component:** A callout pointing to the header of the 'MAJOR SHARES' table.
- Assign a color to 2 or more contents to link them together:** A callout pointing to the 'Assign a color' dropdown menu, which lists colors: No Channel, Blue, Purple, Red, Yellow, Green, and Orange.
- Right click on the securities name to access shortcuts:** A callout pointing to the 'Right click' button in the bottom right corner.

Many other functions are also available, such as full-page zoom, the addition of several components in the same window, and the display of lists with different charts and data.

The screenshot shows the FINECOX interface with several components highlighted by callouts:

- All components can be opened in full screen:** A callout pointing to the 'Full Screen' button in the top right corner.
- Customize your stocklist and watchlist view:** A callout pointing to the 'Customize' button in the bottom left corner.

3 Functions

3.1 The upper section


The upper section of the platform includes:

- a) **Workspace:** windows that allow you to change from one workspace to another with a simple click, providing multiple versions of the platform that are fully customisable and suitable for every need.



- b) **Settings:**  in this section you can:

- Set the platform's level of privacy to hide personal data such as balances and portfolio totals.
- Select the font size and platform colour.
- Activate the "One Click Trade" setting that allows orders to be entered without having to enter a PIN and display the summary. Note: in the event of mandatory disclosures to be displayed prior to order entry, the summary will still be shown.
- Access the advanced settings that allow you to manage your colour preferences, the frequency of push price updates and your default trade, either by order type (limit or market) or by asset class (e.g. Intraday or Overnight).

- c) **Component library:**  allows you to select and drag the following modules into your workspace: Portfolio, Order Monitor, Stocklist, Chart, Watchlist, Trade ticket, News and Instrument card. The details of the individual components will be addressed in a later section.

In the component library, it is also possible to activate:

- **Market bar:** a bar positioned at the top of your workspace with all the main indices, commodities, currencies and any other securities you wish to add. By clicking on the name of a security in the market bar, you can also open a pop-up chart (in a separate browser window).




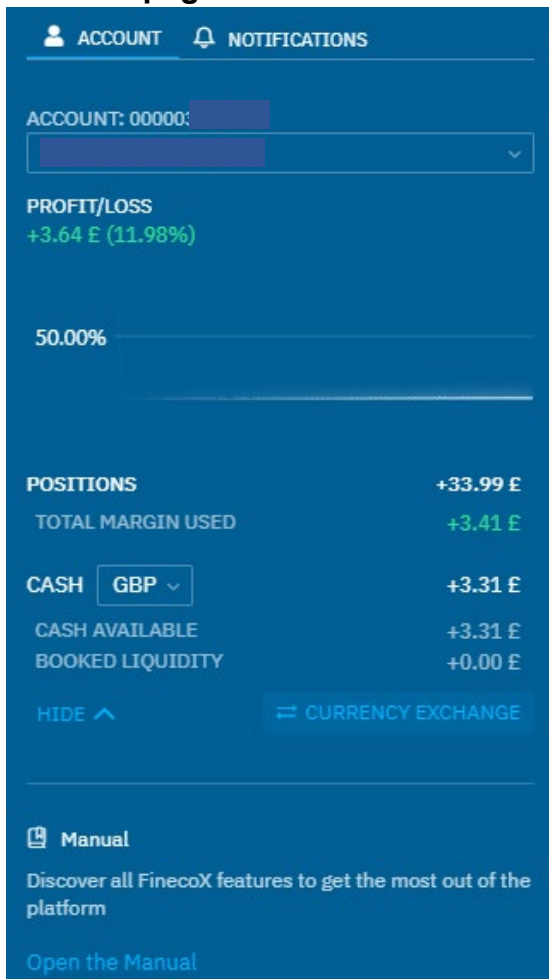
- **Account bar:** allows you to keep your balance, booked availability and current P&L visible and up-to-date at all times.



- **Clock bar:** displays the times in the time zones of the main markets, also indicating open markets (green symbol).

London	●	New York	●	Milan	●	⋮
11:19:34		06:19:34		12:19:34		

d) **Account page**  which consists of two main sections:





- **Account:** the section that allows you to choose:
 - The account to be displayed and/or to be used and the default sub-portfolio for joint accounts.
 - The profit and loss of your portfolio.
 - An interactive push chart showing the progress of your profit and loss since opening the platform.
 - Your portfolio data.
 - Your balance and any margins used.

- The possibility of making a currency exchange by clicking on the “Currency Exchange” button



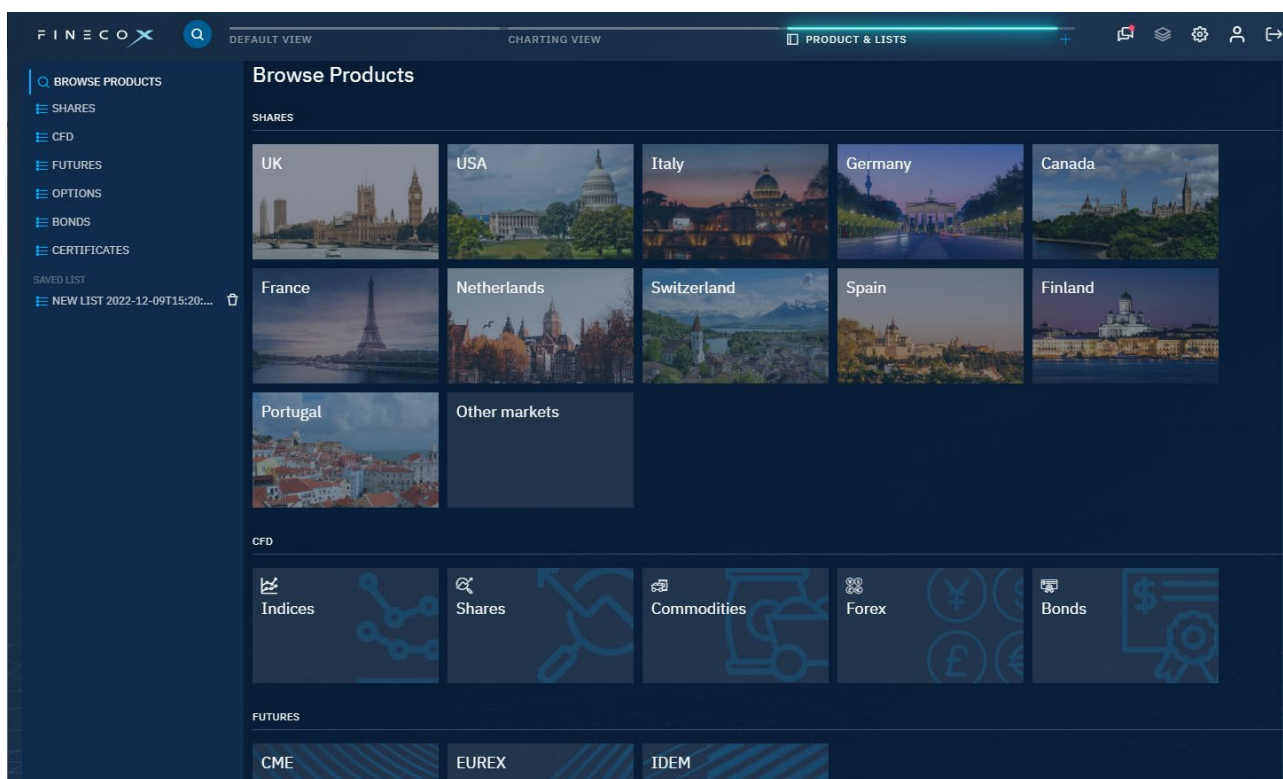
- **Notifications:** a notification centre with a list of all the most recent transactions executed and their details. It's therefore possible to view orders entered, executed, cancelled and more.


- e) **Add new workspaces** : it's possible to add an empty workspace so that you can build your own workspace from scratch. Or you can load preset templates: some are more suitable for beginners and others for more professional traders, all available in the “Template Library”.

- f) **Security search:** using the magnifying glass icon at the top left  you can search for a security, access its main information and place an order. From the search section you can also access the Product Catalogue




i.e. an interactive page showing all the markets where it's possible to trade using FinecoX, including a list of all the securities for each individual market.





- g) **Logout:** click on the icon to log out. 

3.2 The platform workspace

You can create up to 20 workspaces, each of which can be customised.

The components are selectable via the  icon at the top right and can be configured within the platform using drag&drop.

Adding a component to the workspace will open the corresponding module, which can contain one or more components. To add them to the same module click on the  symbol at the top or select them again using the  icon.

Conversely, clicking on  will open a single module full screen.

All available components will be described in detail below:

a) Portfolio:

The portfolio component allows you to view all the securities in your portfolio (except funds) with push updates.

By clicking on the portfolio label in your workspace you can view the summary portfolio either in GBP (open by default) or in the original currency.

By clicking on the "Portfolio" tab it is also possible to customize the columns.

➤ Summary portfolio


PORTFOLIO													
GBP		CURRENCY	ALL PRODUCTS	ALL CURRENCIES					TOTAL P&L (€)	POSITION VALUE (€)	MARGIN USED	BOOK VALUE (€)	
									▲ 3.52 (11.60%)	33.88	3.41	30.36	
DESCRIPTION		P&L	P&L %	P&L 1D	P&L 1D %	QTY	AVG PRICE	MKT PRICE	CTRV MKT	MARGIN USED	CURRENCY	ISIN	
EQ ENEL		0.31	6.96%	0.17	3.62%	1	5.271	5.492	4.84	0.00	EUR	IT0003128367	
EQ AUTO TRADER GR		-0.25	-4.43%	0.10	1.92%	1	5.55	5.304	5.30	0.00	GBP	GB00BVFYFW23	
<div>SELL 530.4</div> <div>BUY 530.8</div>		Protected Orders	CODE	ISIN	MARKET								
			VVVF2.L	GB00BVFYFW23	LSE								
CFD-MO 3I GROUP		2.14	18.84%	0.10	0.75%	1	11.36	13.5	13.50	3.41	GBP	IIKCFD	
EQ AIRTEL AFRICA		-0.12	-9.03%	0.03	3.06%	1	1.295	1.178	1.18	0.00	GBP	GB00BKDRY347	
EQ AVIVA		1.43	18.77%	0.08	0.91%	2	3.814	4.53	9.06	0.00	GBP	GB00BPOYBM80	
TOTAL P&L		P&L 1D TOTAL		BOOK VALUE		POSITION VALUE		MARGIN USED					
TOTAL GBP ▲ 3.52 (11.60%)		▲ 0.49		30.36		33.88		3.41					


It's possible to filter both by security type and currency.


The following information is provided for each security:


- **Description:** the name of the security
- **P&L:** the current profit or loss, both in absolute value and as a percentage
- **Daily P&L:** the profit or loss of the security today, calculated by comparing the previous day's close and the current price. For a position opened during the day, the value of the daily P&L will correspond with the general P&L. For foreign securities, the figure will be converted into euros at the current exchange rate, and hovering the mouse over the value will trigger a window showing the P&L in the original currency.

- **Currency:** the trading currency of the security
- **Total quantity:** the quantity in the portfolio
- **Average book price:** the average price of the position with exchange rate details and the value in the original currency for foreign securities
- **Market price:** the current market price, updated via push
- **Market value:** the current market value of the position, updated via push
- **Margin:** the margin used for derivatives
- **ISIN:** the security's ISIN code


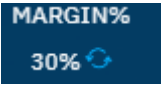
You can also close your positions directly from the portfolio by clicking on the “close” button.  It can be closed completely or only partially.

By clicking on the shield symbol  on each instrument you can protect a position by entering stop loss and take profit. By clicking on the same icon you can view and modify any protections already set.

In the expanded line of each individual security, on the other hand, it's possible to display other information, including individual orders with protection. By clicking on “Protected Orders”  you can view, edit or delete individual protections entered during order entry.

DESCRIPTION ▼	P&L ▼	P&L % ▼	P&L 1D	P&L 1D %	QTY ▼	AVG PRICE ▼	MKT PRICE	CTRV MKT	MARGIN USED	
EQ AVIVA	1.52	19.93%	0.17	1.89%	2	3.814	4.574	9.15	0.	Close
SELL 457.3	BUY 457.5	Protected Orders	CODE	ISIN	MARKET					
			AV.L	GB00BPQY8M80	LSE					

From the expanded line, it's also possible to:

- **Carry on** intraday positions (if allowed by the instrument) by clicking on the  symbol.
- If the instrument allows it, **change the margin** by clicking on the  icon.

Note: portfolio totals (portfolio value and book value) may not match those reported on the website, app or PowerDesk as margin positions (e.g. margin and derivatives) are included in the totals for 100% of their value and not just the margin. This more clearly shows the P&L as the difference between “Portfolio Value” and “Book Value”.

➤ Portfolio in foreign currency:

The main differences with the summary portfolio are the values of the various securities in the original currency instead of being converted into euros.

b) Orders monitor:



DESCRIPTION ▼	STATUS	BUY/SELL	QTY PLACED	QTY EXECUTED	PRICE PLACED	AVG PRICE	PROTECTION	DATE - TIME ▼
EQ ANTOFAGASTA	Fill	Buy	1	1	1,438.5	1,429.5	SL TP TR	12/12/22 12:22:43 R
EQ BARCLAYS	Fill	Buy	1	1	158.8	158.76	SL TP TR	12/12/22 12:26:58 R
EQ 3I GROUP	Fill	Buy	1	1	MKT	1,381.5	SL TP TR	09/01/23 11:16:44 R
EQ ASSOCIAT BRIT FO	Fill	Buy	1	1	MKT	1,764.5	SL TP TR	09/01/23 11:16:57 R
EQ BARRATT DEVLOP	Placed	Buy	1	0	430	0	SL TP TR	09/01/23 11:17:12 R
EQ APPLE	Queued	Buy	1	0	MKT	0	SL TP TR	09/01/23 11:17:37 R
EQ AMAZON.COM	Queued	Buy	1	0	MKT	0	SL TP TR	09/01/23 11:17:50 R
EQ TESLA	Queued	Buy	1	0	MKT	0	SL TP TR	09/01/23 11:18:06 R

The Order Monitor component allows users to view their orders up to a depth of 30 days on all types of securities managed by the platform. It's possible to view entered, executed (or partially executed), expired, cancelled, rejected and protected orders.


Each type of security has specific columns that allow the following information to be displayed:

- **Description:** the name of the security
- **Status:** the status of the order, which you can also click on to view all the info in a single window

NASDAQ	
EQ TESLA	
Date/Time received	09/01/23 11:18:06
ISIN	US88160R1014
Security	TSLA
Description	TESLA
Market	NASDAQ
Direction	Buy
Quantity entered	1
Iceberg Quantity	0
Status	Queued
Expiry Date	09/01/23
Trans Id	30081118060106
PDN ord. no.	30081118060106
Date/Time received	-
Quantity refused/cancelled	0
Execution Date/Time	-
Quantity executed	0
Average executed price	0
Limit Price	0




- **Direction:** the type of transaction (e.g. purchase or sale)
- **Quantity entered**
- **Quantity executed**
- **Price entered**
- **Price executed**

- **Protection:** protections placed on the individual order. This column also allows protections to be modified, deleted or added.
- **Date and time**

By clicking on the  icon next to entered or queued orders it's possible to delete them individually. It's also possible to delete all entered orders (of all asset classes)

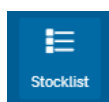
using the  button.

In the order monitor it's also possible to:

- **Replicate a past order** clicking on the  icon
- **Close positions** with the  button
- **Change the margin** with the  icon
- For shares, ETFs, bonds and certificates, **change the order price** by clicking

directly on the price entered (displayed in blue)

PRICE PLACED
1,600



c) Stocklist:

The Stocklist component contains the list of all asset classes tradable on the platform. Click on the three dots to access the list of interest.


FTSE100 NASDAQ 100 DOW JONES DAX CFDS ON COMMODITIES US EQUITIES OPTIONS +						
FTSE100						
MAJOR SHARES	LAST	CHANGE %	CHANGE ▼	SELL ▲	BUY ▲	
FTSE100	1,357	1.27%	17	1,357	1,358	
Dow Jones	190.45	1.38%	2.6	190.35	190.45	
Nasdaq 100	2,239.984	▲ 3.51%	76	2,239	2,241	
Nyse	117.1	2.45%	2.8	117	117.2	
DAX	3,188.5	-2.40%	-78.5	3,188	3,189	
CAC	1,543	-1.22%	-19	1,542.5	1,543.5	
FTSEMIB	4,847	0.98%	47	4,846	4,847	
UK SHARES >	1,661	2.09%	34	1,660	1,661.5	
AMERICAN SHARES >	11,720	▼ 1.61%	186	11,718	11,722	
EUROPEAN SHARES >	532.8	2.38%	12.4	532.6	532.8	
CFD >	3,218	0.00%	-	3,217	3,218	
FUTURES >	456.4	▼ 1.67%	7.5	456.2	456.5	
OPTIONS >	441.1452	4.03%	17.1	441.2	441.5	
BONDS >	852.8	-1.09%	-9.4	852.6	853	
CERTIFICATES >	166.38	1.70%	2.78	166.34	166.4	
EQ BEAZLEY	425	2.53%	10.5	424.8	424.9	
EQ BEAZLEY	687	2.84%	19	686.5	687	

Once selected, all instruments belonging to the chosen list are displayed. There are numerous columns showing the main information for each individual security, customised by asset class.

FTSE100													
DESCRIPTION ▲	LAST	CHANGE %	CHANGE ▼	SELL ▲	BUY ▲	DAY LOW	DAY HIGH	VOLUME ▼	MARKET	TIME	SYMBOL	CCY	ISIN
EQ 3I GROUP	1,357	1.27%	17	1,356.5	1,357.5	1,344	1,360	189,038	LSE	12:44:45	III	GBP	GB00B1YW4409
EQ ABRDN	190.3	1.30%	2.45	190.2	190.4	188.05	192.3	1M	LSE	12:45:47	ABDN	GBP	GB00BF8Q6K64
EQ ADMIRAL GROUP	2,238	3.47%	75	2,237	2,239	2,163	2,240	98,818	LSE	12:45:44	ADM	GBP	GB00B02J6398
EQ AIRTEL AFRICA	117	2.36%	2.7	117	117.3	114.3	117.2	362,947	LSE	12:45:50	AAF	GBP	GB00BKDRY347
EQ ANGLO AMERICAN	3,187.5	▲ -2.45%	-80	3,187	3,187.5	3,187	3,338.5	721,225	LSE	12:46:02	AAL	GBP	GB00B1XZS820
EQ ANTOFAGASTA	1,541.5	▲ -1.31%	-20.5	1,540.5	1,542	1,534	1,567	214,454	LSE	12:45:57	ANTO	GBP	GB0000456144

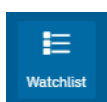
If present, you can click on the arrow on the column title to sort the list in ascending or descending order.

From this menu it's possible to access the order entry screens with a single click on the "buy" or "sell" rectangle or by clicking on the price box, which will open a book.

Alternatively, click on the three dots to the left of the name  or right-click on the title to select different functions:

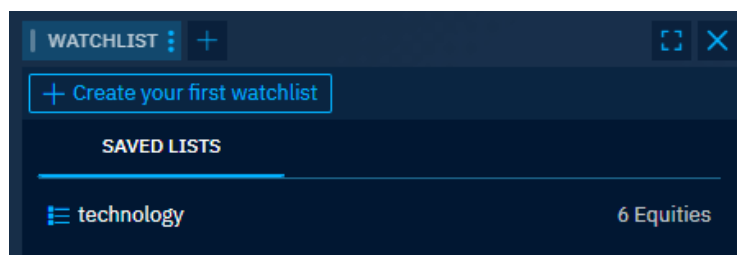
- **Trade:** opens the book of a security
- **Add alerts/conditions:** opens a mask allowing the entry of alerts or conditional orders
- **Open chart in pop-up:** allows you to open a chart in a separate browser window. Only one chart can be opened in a pop-up at a time. If there's a chart already open and you try to open another one, the first one will be replaced.
- **Add chart:** opens the chart of a security in the workspace
- **Add product details:** opens a component with the security card, analysis and main information
- **Add to Watchlist:** adds the security to a favourite list.

d) Watchlist:



With FinecoX you can create up to **20 Watchlists** that allow you to follow your favourite securities.

Create your first watchlist or import one of your saved list



Click on the three vertical dots to the right of the loaded list



Various functions are available, allowing you to:

- Change the watchlist displayed
- Rename it
- Create a new one
- Duplicate it
- Open it in the Products and Lists section

Both the Stocklists menu and the Watchlists have four different views



selectable by clicking on the three vertical dots to the right of the loaded module > select the view

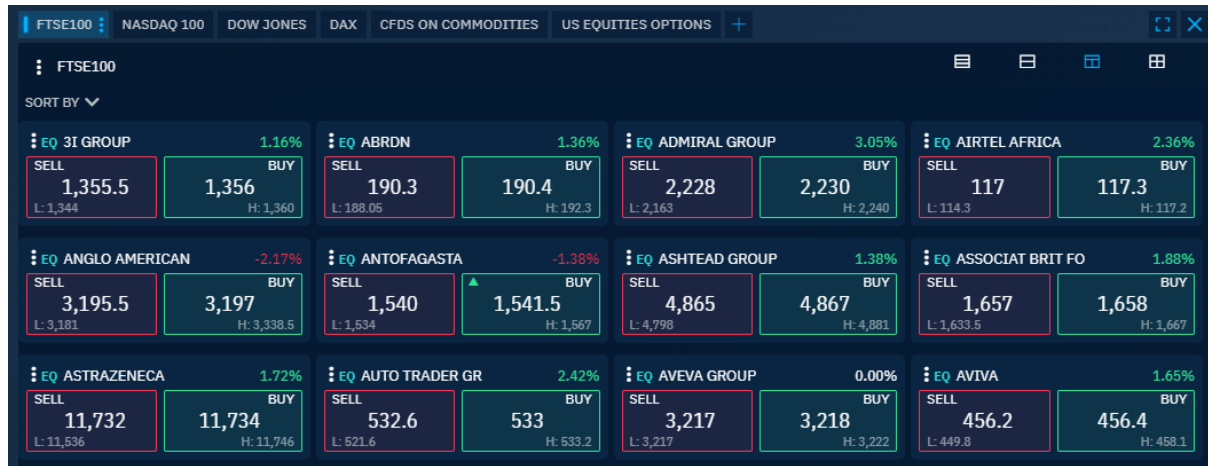
- i. **Spreadsheet:** is set by default and provides the main daily performance data for each security

FTSE100										
DESCRIPTION ▲	LAST	CHANGE %	CHANGE ▼	SELL ▲	BUY ▲	DAY LOW	DAY HIGH	VOLUME ▼	MARKET	
EQ 3I GROUP	1,356.5	1.23%	16.5	1,356	1,357	1,344	1,360	196,852	LSE	
EQ ABRDN	190.45	1.38%	2.6	190.4	190.55	188.05	192.3	1M	LSE	
EQ ADMIRAL GROUP	2,233	3.24%	70	2,230	2,232	2,163	2,240	106,159	LSE	
EQ AIRTEL AFRICA	117.1995	2.36%	2.7	117	117.3	114.3	117.2	366,074	LSE	
EQ ANGLO AMERICAN	3,195.5	-2.19%	-71.5	3,195.5	3,196.5	3,181	3,338.5	745,745	LSE	
EQ ANTOFAGASTA	1,540	-1.41%	-22	1,541	1,542	1,534	1,567	232,905	LSE	
EQ ASHTAD GROUP	4,849	1.02%	49	4,847	4,849	4,798	4,881	1M	LSE	
EQ ASSOCIAT BRIT FO	1,658.5	1.94%	31.5	1,657.5	1,659	1,633.5	1,667	197,948	LSE	

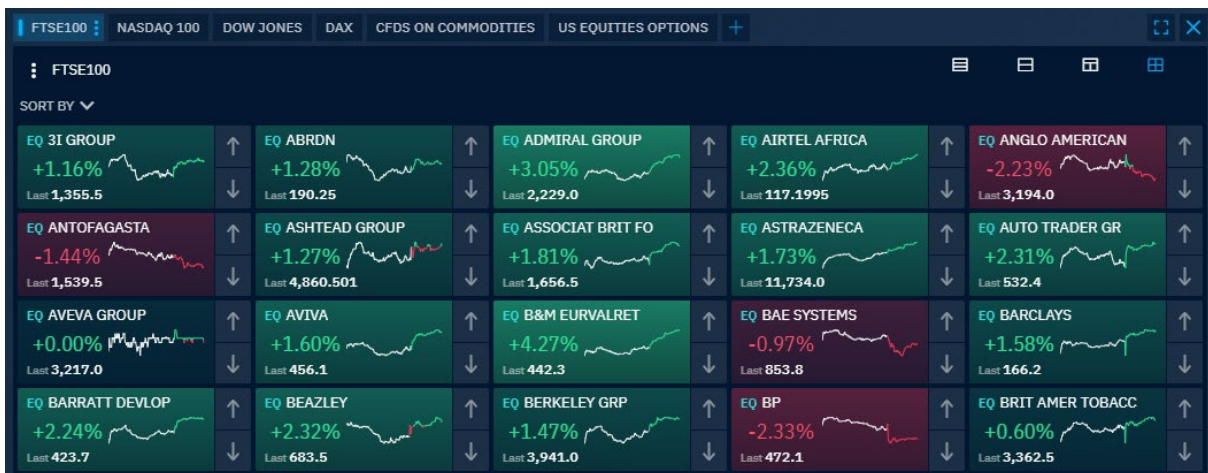
- ii. **Trend:** this type of view adds an interactive chart (trend) and the daily price range for individual securities to the main information

FTSE100										
DESCRIPTION ▲	TREND	DAY RANGE	LAST	CHANGE %	SELL!!! ▼	BUY ▼	MARKET	CCY		
EQ 3I GROUP		1,344 1,360	1,355.5	1.16%	1,355.5	1,356	LSE	GBP		
EQ ABRDN		188.05 192.3	190.4	1.36%	190.3	190.5	LSE	GBP		
EQ ADMIRAL GROUP		2,163 2,240	2,229	3.05%	2,228	2,230	LSE	GBP		
EQ AIRTEL AFRICA		114.3 117.2	117.1995	2.36%	117	117.3	LSE	GBP		
EQ ANGLO AMERICAN		3,181 3,338.5	3,192	-2.30%	3,192.5	3,194	LSE	GBP		
EQ ANTOFAGASTA		1,534 1,567	1,540.5	-1.38%	1,539.5	1,541	LSE	GBP		
EQ ASHTAD GROUP		4,798 4,881	4,856	1.17%	4,854	4,857	LSE	GBP		
EQ ASSOCIAT BRIT FO		1,633.5 1,667	1,657	1.84%	1,657	1,658	LSE	GBP		

- iii. **Quote panel:** allows orders to be entered immediately by clicking on Sell or Buy buttons



- iv. **Heatmap:** provides an at-a-glance graphical display of the daily performance of individual securities thanks to their colours (green and red) and shades



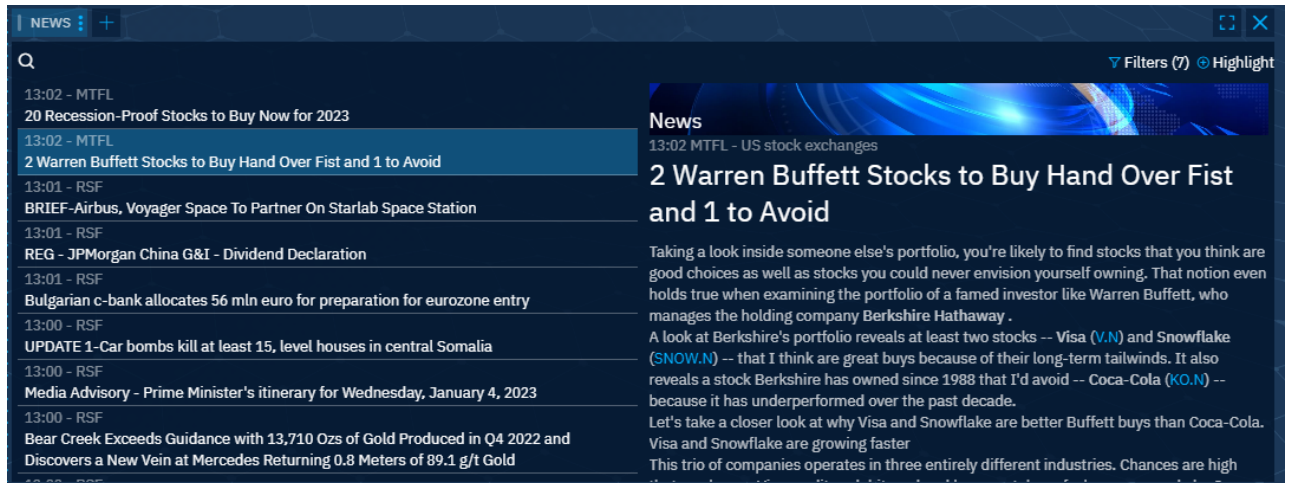
e) **News:**


The news component allows all the latest news to be displayed. Using filters you can find the news that you're most interested in. More than 30 filters are available for this purpose, which can be selected from the top right corner of the component.

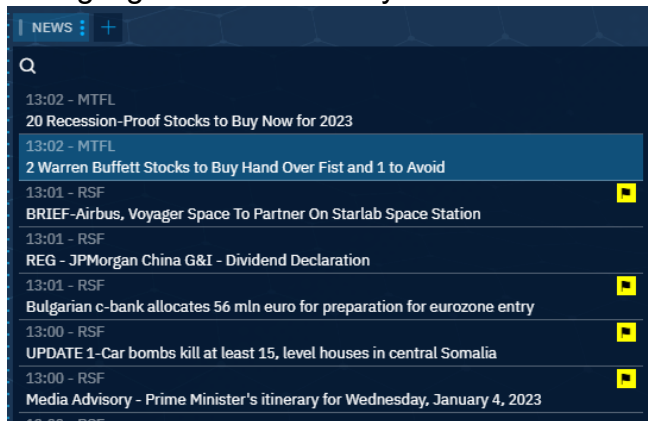
The news component has two columns:

- To the left is the list of the latest headlines.
- To the right is the text of the selected news item.

If you reduce the component too much, a single column with the text of the selected news item will be displayed. In this case, it will be possible to return to the list of headlines with the [Back](#) button in the top left-hand corner.




It's possible to highlight certain news items by clicking on "Highlight" (top right, next to the filters). This way individual news items belonging to the selected category will be highlighted with a  symbol.



f) Product details:



The product details component shows details, fundamentals, news and other information related to an individual security.

When available, specific documents can be accessed (such as the security sheets in the case of bonds) by clicking on the  symbol next to the name of the security.

Any warnings, including KIDs, are placed at the bottom of the card.

There are also four different pages offering further analysis (selectable via the tabs at the top):

- a) Yields and details: show the chart with a depth of up to five years
- b) 5D probability: shows a chart with the 5-day range of supports and resistances
- c) Analysts' positions: shows the position of analysts and their targets in a chart
- d) Technical analysis: shows supports and resistances



- g) **Book:** An order entry mask, the details of which will be discussed in more detail in the following paragraphs.



ASTRAZENECA ▲ 1.75% **11,736** ▲ 1.75% **BID** 11,736 **ASK** 11,738

LEVERAGE

X1-Share **X2-CFD** **X5-CFD**

100 **Market**

ADD PROTECTION

Order estimate **11,736.00 £**

Cash **+3.31 £**

SELL **BUY**

Monitor

h) Chart

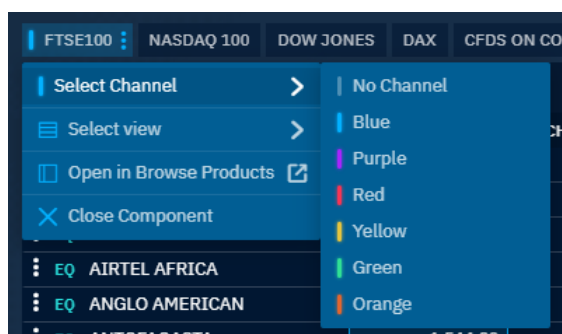
The component dedicated to displaying the detailed chart for the instrument in question. It will be described in detail in a later section.



i) Links between components

A function that distinguishes the platform is the possibility of interlinking the various components.

In fact it's possible to click on the name of a component and assign a colour to it via the "Select Link" function.

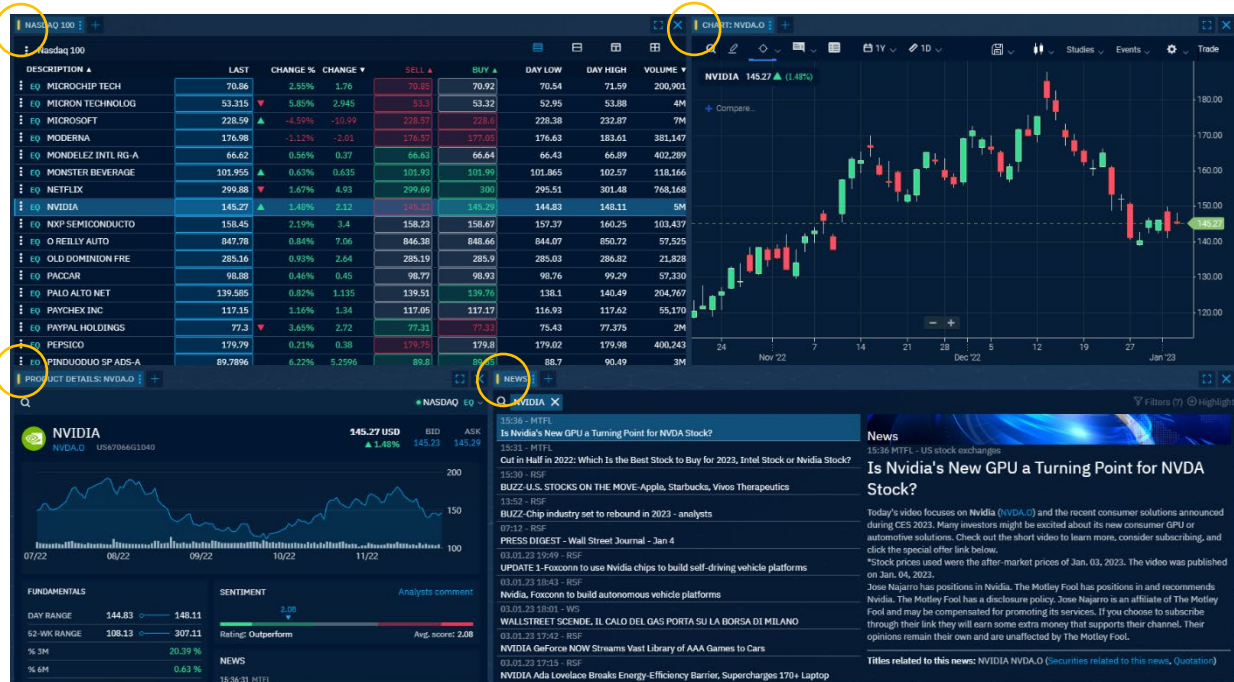


Once several components are linked with same colour, the security selected in one component will also be loaded into the others.

Example:

Loading a watchlist (or a stocklist), a chart, an instrument card and news in the same workspace, it is possible to assign the same colour to each of these components. This way, clicking on an individual security in the watchlist will also

load the chart, the instrument card and the news of the security selected in the watchlist.



The platform's predefined workspaces already have some components with an assigned colour. For example, the “Classic view (default)” workspace available in the template library has the FTSE MIB basket linked to the chart: clicking a security in the basket list loads the chart of that security.

4. PLACING ORDERS

FinecoX allows orders to be placed in three ways:

a) Miniticket

The screenshot shows the Miniticket order entry form for MICROSOFT. The form includes fields for quantity (50), price (228.76), and order type (Limit). There are also fields for Stop Loss and Take Profit. The order estimate is 11,438.00 \$, and the cash requirement is +10.76 \$. The form is titled 'EQ MICROSOFT' and has a 'Book' button at the bottom.

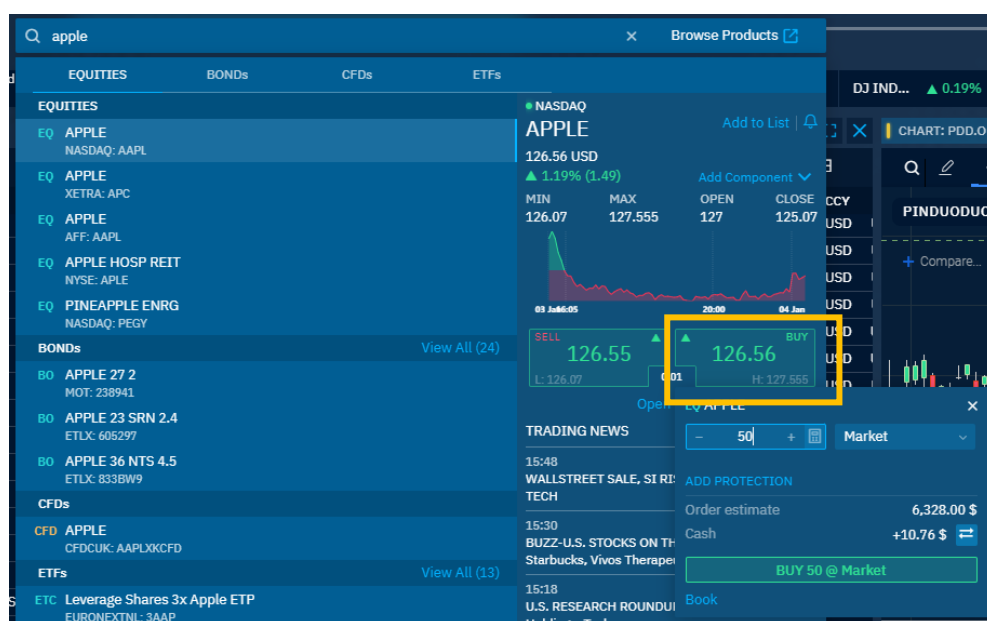
An order entry mask with all the main parameters, available for all instruments (except options). Using the “Add protection” link you can add a take profit or stop loss protection directly during order entry.

It can be accessed by clicking on the price in the “Sell” or “Buy” columns from a stocklist, a watchlist or the Products and Lists section.

The screenshot shows a table of Nasdaq 100 stocks. A yellow box highlights the 'BUY' price for Microsoft (229.78). A pop-up window titled 'EQ MICROSOFT' is open, showing a 'BUY @ Market' button and an 'ADD PROTECTION' link. The pop-up also displays the order estimate and cash balance.


DESCRIPTION	LAST	CHANGE %	CHANGE	SELL	BUY	DAY LOW	DAY HIGH
EQ MICROSOFT	229.74	-4.11%	-9.84	229.74	229.78	228.295	232.87
EQ MODERNA	179.755	0.43%	0.765	179.56			
EQ MONDELEZ INTL RG-A	66.56	0.47%	0.31	66.55			
EQ MONSTER BEVERAGE	101.8	0.47%	0.48	101.78			
EQ NETFLIX	301.2497	2.14%	6.2997	301.25			
EQ NVIDIA	146.48	2.33%	3.33	146.43			
EQ NXP SEMICONDUCTO	158.73	2.37%	3.68	158.45			
EQ O REILLY AUTO	847.155	0.77%	6.435	846.33			
EQ OLD DOMINION FRE	285.49	1.05%	2.97	285.49			
EQ PACCAR	98.45	0.02%	0.02	98.4			

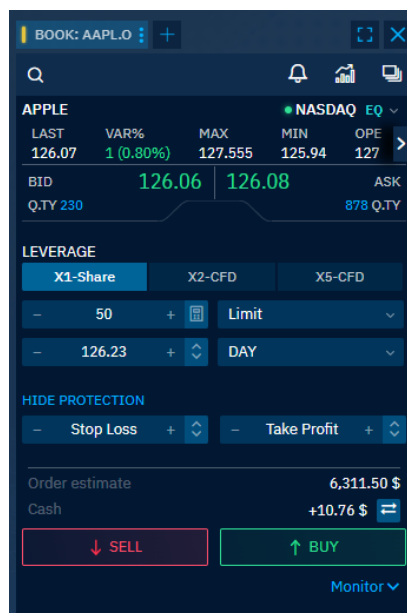
Alternatively, it can be reached by searching for a security using the magnifying glass in the top left-hand corner and clicking on “Buy”/“Sell”.



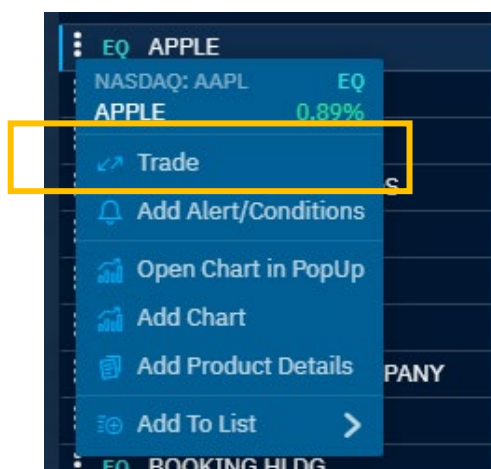
b) Book

A professional order entry mask showing the main information of the security (such as minimum, maximum, last price and volume) and up to five price levels that can be clicked on to pre-fill the book with the selected limit price.

You can access it by adding a book  to your workspace or with a separate browser window (pop-up)




In the various menus, such as stocklists, watchlists, the products and lists section and the portfolio, it's possible to open a book (in a pop-up) by right-clicking on the name of the security > order, or by clicking on the three dots to the left of the name.

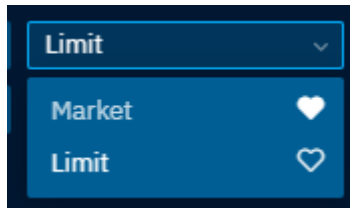


The book can also be accessed from the miniticket via the “book” button. With this method, the order parameters will already be pre-filled with the data in the miniticket.

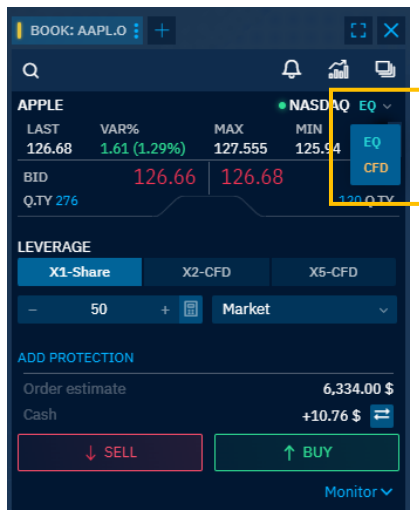
Here again it's possible to add a take profit or stop loss protection on an individual order using the “Add protection” link.

From both Book and Miniticket, it's possible to exchange currencies by clicking on the  “exchange” icon.

You can also select your preferred order type by clicking on the heart next to “limit” or “market” when placing an order.

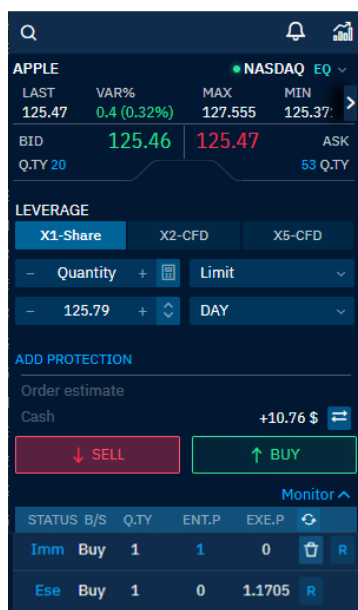


Another feature available from the book is the selection of the instrument type. For example, if there is also the possibility of trading a stock via CFDs, it will be possible to make the selection via the dropdown list in the top right-hand corner of the book.



In the monitor located at the bottom of the book (click on “Monitor”), it is also possible to view and manage the orders placed and executed during the current day. Directly from the monitor, the orders displayed can be:

- Deleted via the recycle bin icon
- Replicated using the “R” icon
- If the instrument allows it, changed by clicking on the price (highlighted in blue)



c) Chart trading

FinecoX allows orders to be placed directly from charts. Simply click on the label

Trade positioned in the top right corner of the chart. The following menu will open:



Clicking on one of the three options, you can place limit or market orders:

- **MKT**: opens a market order entry mask



- **BUY** and **SELL**: allow you to place a limit order by dragging the price directly from the Y-axis of the chart



You can trade in all instruments that have a chart available, including on margin. By clicking on SL or TP it's also possible to add protections.

You can display a symbol on the chart showing your executed orders. This function is always active if you open the chart trading mode, otherwise you can activate or deactivate it via the “show orders” event menu. Only recent orders are shown (still visible in the order monitor).

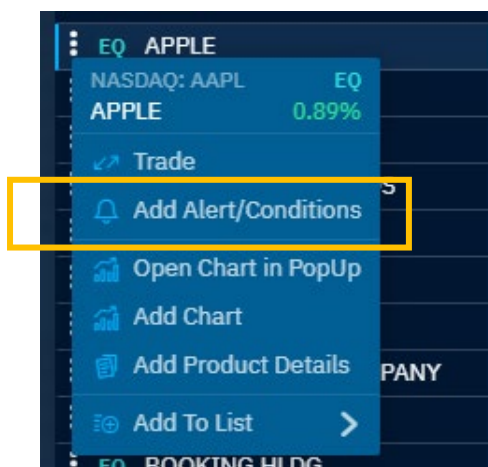


d) Orders with conditions and alerts

Orders with conditions and alerts can be entered in two ways:

- Via the book, by clicking on the  symbol in the top right-hand corner.

- Right-clicking on the name of a security in a list or portfolio and selecting “Add alerts/conditions”.



e) Warnings

At the bottom of the various order entry masks above is a “Warnings” link that includes any relevant warnings associated with the security in question. In the summary, at the top, there are other possible warnings that must be viewed before completing the order placement.



5. CHARTS

FinecoX charts provide advanced and customised tools to follow and interpret market trends at a glance, as well as enriching the user experience and the possibilities for technical analysis. They can be accessed:

- Selecting the chart component via the menu





- Right-clicking on the name of a security and then selecting "Add chart"



- With a click on the three dots of an instrument and selecting "Open chart in pop-up". In this case the chart will be opened in a separate browser window. Only one chart can be opened in a pop-up. If there's a chart already open and you try to open a second one, the first one will be replaced.

The section in the top left allows you to:

- Search for a security and load its chart 
- Select **over 35 drawings** : after selecting the drawing you wish to sketch, click the starting point, drag it and click again to complete it.





Once drawn, it's possible to customise the graphic by right-clicking, which will show the following selections:



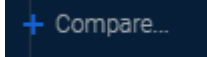
- **Change settings:** provides the possibility to change the main settings of the drawing, including layout and colour
- **Duplicate drawing**

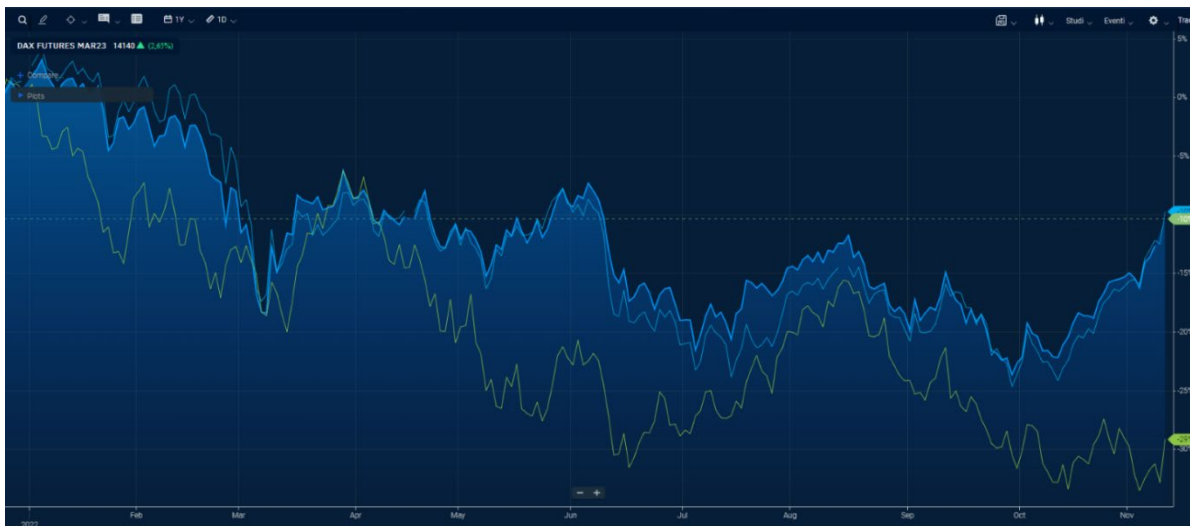
- **Deleting drawing**



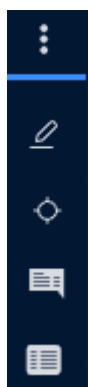
- Use a **crosshair instead of a cursor** for greater precision 
- Display a window with the **main information** for each candlestick (or portion) of the chart selected 





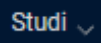
- Display a table with the security's **historical data** 
- Select the chart's **timeframes** 
- **Compare several charts** by clicking on  and choosing between different colours so that even more than two securities can be compared at once.



If the chart window is too narrow, the menus can be accessed by clicking on the three dots that appear:



In the top right-hand section, the following functions can be found:

- **Save template** : allows you to save your own studies, timeframes and chart types and recall them at any time, even for different securities.
- **Select chart style** : more than 15 different chart types are available, from the most classic (such as candlestick) to the most unusual (such as Point&Figure).
- Access **over 100 indicators**  that are fully customisable (you can view their settings by right-clicking on the indicator)




Moving Average

Period
200

Field
Close


Type
simple

Offset
0

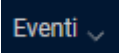


MA


Panel
Auto

Show as Underlay
☐

Y-Axis
shared


DONE

- Display the **most important events** on the chart 
- Manage the **main chart settings**  such as changing the colour of the candlesticks.
- **Place and manage your orders** directly from the chart  as explained in the section on placing orders.

User Guide

Version 8.8

September 2022

About this guide

This guide documents the user interface of the charting library's most extensively developed template, *technical-analysis-chart.html* (formerly *sample-template-advanced.html*). See an [example implementation](#) of the template on the ChartIQ demo site.

Library templates are HTML files that implement various capabilities of the ChartIQ library. The templates simplify and accelerate the development process. Developers can include the templates in their applications as is, extract code snippets from the template files, or just examine and learn from the template source code.

The user interface of *technical-analysis-chart.html* provides access to all standard features of the charting library.

In addition, *technical-analysis-chart.html* has been designed to easily include add-on products that are not part of the standard charting library. This guide also documents those add-ons.

Audience

The ChartIQ User Guide is intended for chart users, such as data analysts. Software developers should see the [ChartIQ library documentation](#).




What's new





Version 8.8 of the charting library introduces the following features and enhancements:

- A new emoji picker for SignallQ
- Manage studies from the chart legend
- Symbol Search dropdown menu has been replaced by a Search dialog
- Enhancements to the user interface, drawing tools, and multi-charts

To find the new features, search for **NEW v8.8**.

Contents

About this guide	2
Audience.....	2
Chart User Interface.....	7
Responsive Display UI.....	8
Symbol lookup 	9
Comparisons.....	10
Drawing 	12
Drawing palette	13
Create a drawing	13
Drawing modes	14
Smart Drawings.....	14
Magnet 	14
Manage drawings	14
Drawing palette controls	15
Drawing tools.....	16
Drawing Elliott Waves	20
To draw a wave	20
Mouse	20
Mobile or touchscreen	21
To adjust the wave crests	22
Mouse	22
Mobile or touchscreen	22
To move the wave	22
Mouse	22
Mobile or touchscreen	22
To delete a wave	22
Mouse	22
Mobile or touchscreen	23
To manage a wave	23
Mouse	23
Mobile or touchscreen	23

Customizing wave drawings	24
Style palette	24
Configuration toolbar	25
Keyboard shortcuts.....	26
Favorites	26
Style palette	26
Style palette controls.....	26
Crosshairs 	28
Info display 	29
Table view 	31
Chart Type menu	32
Periodicity menu	33
Views menu	33
Studies menu	33
Study legends.....	36
Drag and drop	37
Events menu	37
SIGNALIQ	37
CHART EVENTS.....	39
PANEL EVENTS	39
Preferences menu 	40
CHART PREFERENCES	40
Extended Hours	40
Market Depth	41
L2 Heat Map	41
Y-AXIS PREFERENCES	42
Log Scale.....	42
Invert.....	42
ADDITIONAL FEATURES	42
THEMES	45
LOCALE	47
Share	48
Time frame selector	48

Navigation	49
Panning	49
Zooming	49
SmartZoom	50
Full-screen display.....	50
Hidden outliers	51
Study panels	52
Multiple y-axes	52
Drag and drop	54
Series	54
Procedures	55
Y-Axis.....	55
Procedures	55
Add-on features	56
Chart Grid.....	56
Select the grid size.....	57
Change a chart symbol	57
Accessibility	58
Chart area	58
Drawing	61
Dialogs & UI Controls	61
Optional Products	62
Active Trader + Trade From Chart.....	62
Life Cycle Events.....	62
View life cycle events	63
View event information.....	63
Event zoom.....	65
Subevents.....	66
SignalIQ	67
Technical Analysis: Data Forecasting.....	68
Term Structure	69
Term Structure user interface.....	70
Entity lookup	71
Calendar	71




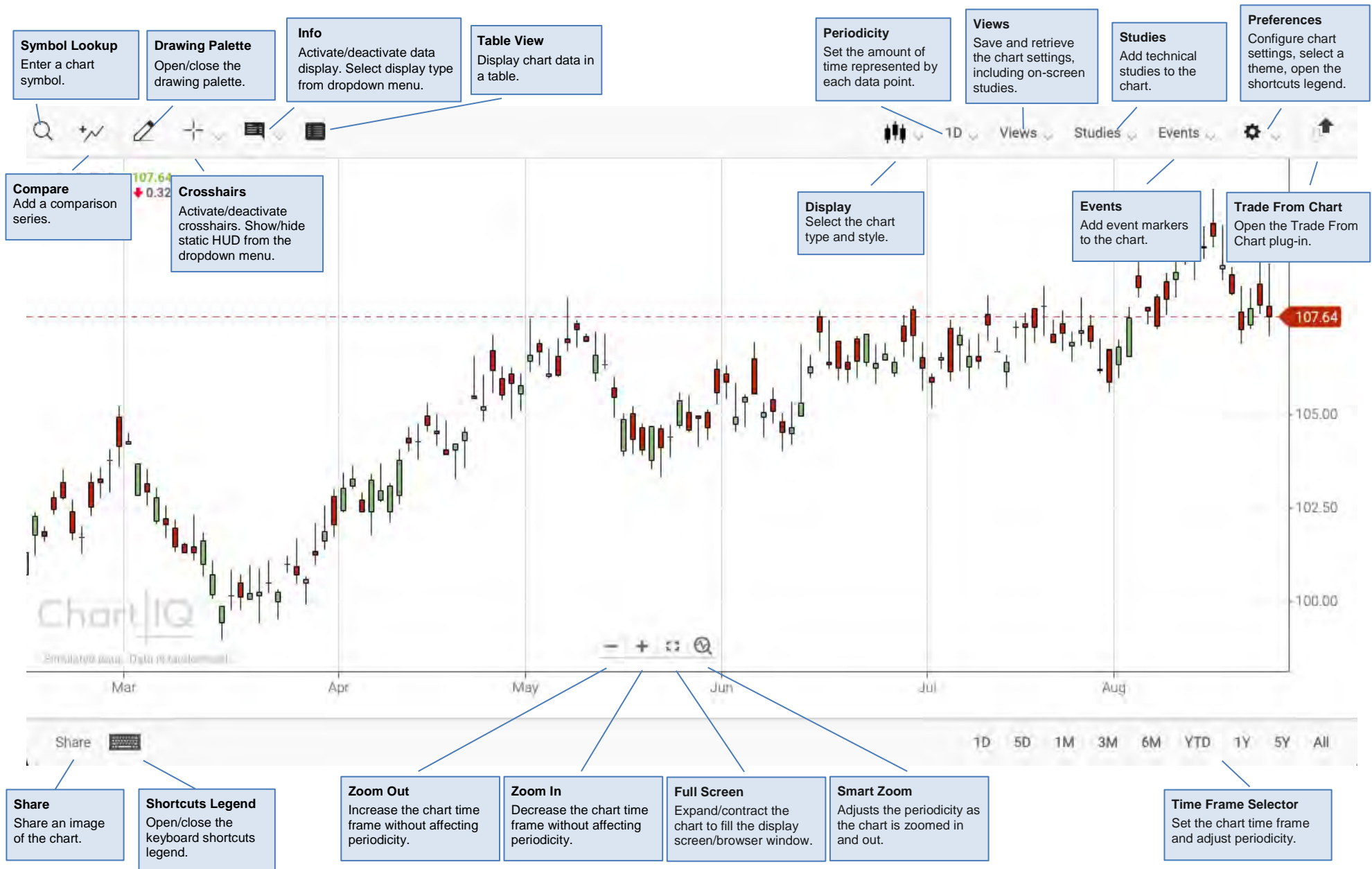
Instrument value	72
Crosshairs 	72
Preferences 	73
OPTIONS	73
Shading	73
X-Axis Scaling	73
Update Animations	74
Show Update Stamp	74
Recent Updates	75
Set Highlight Duration 	75
Timeline Date Selector	76
Menus	77
Toolbar	77
Y-Axis	78
THEMES	78
Compare	78
Add an entity curve	79
Add an historical curve	80
Plots display	80
Remove curves	81
Change curve color	81
Curve spreads	81
Varying instrument sets	82
Share	82
Zoom	83

Chart User Interface

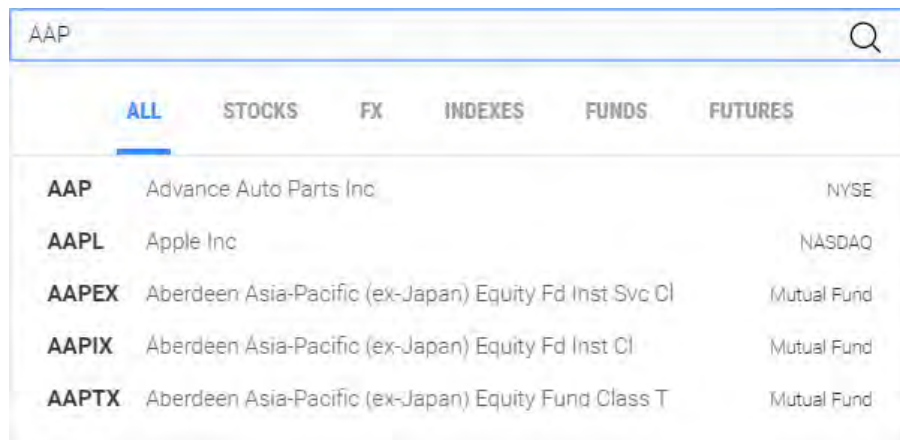


Responsive Display UI



Symbol lookup

Use the symbol lookup field to find instruments (stocks, currency exchange rates, indexes, and so forth) by entering the symbol that represents the instrument.



Symbol	Name	Exchange
AAP	Advance Auto Parts Inc	NYSE
AAPL	Apple Inc	NASDAQ
AAPEX	Aberdeen Asia-Pacific (ex-Japan) Equity Fd Inst Svc Cl	Mutual Fund
AAPIX	Aberdeen Asia-Pacific (ex-Japan) Equity Fd Inst Cl	Mutual Fund
AAPTIX	Aberdeen Asia-Pacific (ex-Japan) Equity Fund Class T	Mutual Fund

To find an instrument:

1. Select the magnifying glass icon or the symbol input field.
2. Select one of the instrument categories (**STOCKS**, **FX**, **INDEXES**, **FUNDS**, or **FUTURES**) to limit your search. To search all categories of instruments, select **ALL**.
3. Enter the instrument symbol ("AAP" in the example above).
As you enter a symbol, the list of instruments is refined to successively approximate the input.
4. Select an instrument from the list, or press **Enter** to select the symbol in the text input field.

Comparisons

Comparison series are plots of instruments in addition to the main chart series. Comparisons provide a side-by-side look at different instruments. Comparison series are plotted over the same time frame, using the same periodicity as the main series, but are displayed in a different style or color. Your chart can include numerous comparisons.

Note: Comparisons change the chart y-axis values to percentages. The time series plots and the y-axis are adjusted so that all plots start at 0% (at the left side of the chart). Succeeding data is plotted as the relative change from 0%. When all comparison series are removed from the chart, the y-axis reverts to its normal type of values.

To compare an instrument to the main chart series:

1. Select the compare icon (upper left corner of the chart)
2. Enter the instrument's symbol in the symbol lookup window



A plot for the instrument is drawn on the chart (purple line):



Figure. Comparison series overlaid on chart.

To see information about the comparison plot, move your mouse over the **Plots** control (upper left corner of the chart):




To close the Plots display, move your mouse away from the control.

To keep the Plots display open, select the **Plots** control. Select the control again to close the display.




To remove the comparison, select the **X** next to the instrument's current price.

To manage the comparison, move your mouse over the instrument's line on the chart:

- Right-click the line to delete the comparison.
- Click and hold the line until the drag icon  appears, and then drag the line to the top or bottom of the chart to place the line in its own panel. See the [Drag and drop](#) section to learn about additional drag-and-drop capabilities.

Drawing

Trend lines, average lines, channels, Fibonacci retracements, arrows, callouts, doodles — an extensive set of drawing and styling tools enable you to creatively highlight and graphically analyze charts and studies.

	<h2>Drawing palette</h2> <p>The drawing palette contains a wide variety of drawing tools along with a collection of controls used to configure the palette and manage drawings. (See Drawing palette controls and Drawing tools.)</p> <p>Select the Draw control  to open the drawing palette.</p> <h2>Create a drawing</h2> <p>To draw on a chart or study:</p> <ol style="list-style-type: none"> 1. Select a tool from the palette. On desktop browsers, crosshairs appear, indicating the position of the tool. 2. Click or press to begin the drawing. (Release the mouse button or lift your finger or stylus from the screen.) On touch devices, crosshairs appear, indicating the starting point of the drawing; the crosshairs are positioned slightly up and to the left of your finger or stylus. 3. Move the mouse or your finger or stylus to the endpoint of the drawing. 4. Click or press to end the drawing. On touch devices, the crosshairs move to the endpoint of the drawing. <p>In default drawing mode (see below), the selected tool remains active until you select the No Tool control or close the drawing palette. </p>
--	--

Drawing modes

Drawing is accomplished in one of two ways (or modes) depending on your system's configuration:

- **Default mode** — As described above in “Create a drawing,” the default drawing mode uses clicks or presses to begin and end the drawing process. Default mode gives you precise control over the placement and size of drawings. In addition, default mode enables the creation of complex drawings, such as channels, that are defined with more than two clicks or presses.
- **Drag to draw** — Drag to draw mode enables you to create drawings by clicking or pressing, holding, and dragging — like drawing in most paint programs. Drag to draw is familiar to most users but lacks the precision of default mode and does not support multiple-point drawings.

Smart Drawings

NEW v8.4

Drawings will automatically attach themselves to any series or study that the mouse is hovering over before the drawing is started. Hence, if the series or study is moved to another panel, the drawing moves with it, preserving its position. Similarly, if the study or series is removed from or re-added to the chart, the drawing will be removed/re-added.

Magnet

Click the magnet icon at the bottom of the palette to make the drawing tools lock onto specific values of the data series. When magnet mode is on, a blue bullet follows the data series to show the value currently selected. The drawing tools are magnetized to the series to which the mouse is closest. As you move the mouse close to another series, the drawing tools magnetize to that series. If a drawing is started on a series, the drawing tool is magnetized to the same series to finish the drawing.

Manage drawings



Drawings can be repositioned and resized by drag-and-drop interactions. Drag and drop a drawing to move it to another location. Drag the start and end points of a drawing to change the drawing's shape and size. To reveal the start and end points of a drawing, hover your mouse over the drawing; on touch devices, tap the drawing.

Note: Drawings scale across different periodicities.







To edit or delete a drawing on desktop browsers right-click the drawing to access a context menu, which provides the following options:







- **Edit Settings** — Accesses the style palette (see [Style palette](#)), which enables configuration of font, color, and other style settings.
- **Clone Drawing** — Creates a copy of the drawing, which can be applied elsewhere on the chart, study, or series.
- **Layer Management** — Positions overlapping drawings on the z-axis, relative to one another. Brings a drawing forward or sends it backward, moves it to the top or bottom of a stack of drawings.
- **Delete Drawing** — Removes the drawing from the display.

On touch devices




- Double tap a drawing to delete it; or tap the drawing to highlight it, then tap the delete icon  to remove the drawing.
- To edit the drawing settings, tap the drawing to highlight it, then tap the settings icon  to open the style palette.








Drawing palette controls













Control	Description
	Displays the drawing tools in a list view.
	Displays the drawing tools in a grid view.
	<p>Detaches the palette from the side of the screen, making the palette draggable anywhere on-screen.</p> <p>Drag the detached palette using the drag  strip at the top of the palette.</p> <p>Dock the palette by selecting the Attach control. </p>
	Deselects the current drawing tool; that is, sets the palette so that no drawing tool is in use.












	Enables measurements of the chart, study, or series area. Select the measure tool, then draw a line on the chart to measure an area.
	Undoes drawing actions.
	Restores drawing actions removed by Undo.
All ▾	Enables selection of subsets of the drawing tools, such as text tools, statistics-related tools, and favorites (see Favorites).
	Causes a drawing tool to be attracted to a line, such as the main chart series, a comparison series, or a study. Magnetizing a tool to a line provides precise placement of the drawing on the line.
	Removes all drawings from the display.
	Restores all drawing settings to their default values. Tool settings can be changed using the style palette (see Style palette).



Drawing tools

Text	
	Annotation
	Callout
	Trend Line NEW v8.8 (icon)

Statistics	
	<p>Average Line</p> <p>Average line drawings can be applied to any rendered series or study line, not just the primary series.</p> <p>To draw an average line using a mouse:</p> <ol style="list-style-type: none"> 1. Hover over a series or study line (for example, the Jaws of an Alligator study) 2. Click the line and release the mouse button to mark the starting point of the average 3. Move the mouse left or right 4. Click the mouse to mark the endpoint of the average <p>To draw an average line on mobile devices:</p> <ol style="list-style-type: none"> 1. Tap a series or study line on the screen to mark the starting point of the average 2. Tap elsewhere on the series or study line to mark the endpoint of the average
	Quadrant Lines
	Regression Line — Option to show 1st, 2nd, and 3rd standard deviation lines on the regression drawings.
	Tirone Levels
Technicals	
	Gann Fan
	Gartley
	Pitchfork

	Speed Resistance Arc
	Speed Resistance Line
	Time Cycle
	Elliott Wave (see Drawing Elliott Waves below)
Lines	
	Channel
	Continuous
	Crossline
	Doodle
	Horizontal Line
	Line
	Ray
	Vertical Line

Fibonacci	
	Fibonacci Retracement
	Fibonacci Projection
	Fibonacci Arc
	Fibonacci Fan
	Fibonacci Time Zone
Volume <i>NEW</i> v8.4	
	Volume Profile by Date Range
Markings	
	Ellipse
	Rectangle
	Arrow
	Check
	Cross



	Focus
	Heart
	Star

Drawing Elliott Waves

The Elliott Wave drawing tool enables you to identify and draw Elliott Waves on time series charts. The tool enables you to quickly label impulse and corrective waves with the appropriate step in the wave count. In addition, you have the option to show the segment lines to emphasize each wave. A “drop zone” indicates where the next wave in the sequence can be drawn. The drawing tool magnet snaps the drawing cursor to time series data points to precisely position wave lines.

To draw a wave

Mouse

1. Select the Elliott Wave tool  from the drawing palette.
2. **Optional.** Select the Magnet  icon at the bottom of the drawing palette.
3. Click a data point (or other location) on the chart to begin the drawing.
The starting point of the wave is labeled with the start of the wave count. The endpoint of the wave is labeled with the next number in the wave count.
4. Click the next data point on the wave.
The crest of the wave is labeled with the current wave count.
5. Continue to select points until the wave is complete.
As you move your mouse, a portion of the chart is highlighted (the drop zone) to indicate where the next data point must be selected.
Also, a display at the top of the chart shows the following about the data point at the mouse cursor position:



5.87 (6%) 75 Bars

- Change in the value from that of the previous wave crest
- Percentage change in value
- Number of data points included in the wave



Figure. Elliott wave with custom drawing settings, showing drop zone and measurement display.

Mobile or touchscreen


1. Select the Elliott Wave tool  from the drawing palette.
2. **Optional.** Select the Magnet  icon at the bottom of the drawing palette.
6. Tap a data point (or other location) on the chart to begin the drawing.
7. Touch the screen and slide your finger (or stylus) to the next point on the wave.
The starting point of the wave is labeled with the start of the wave count. The endpoint of the wave is labeled with the next number in the wave count.
8. Lift your finger or stylus at the next point on the wave.
9. Tap the position to set the endpoint of the wave.
The crest of the wave is labeled with the current wave count.
10. Touch the screen and slide your finger (or stylus) to the next point on the wave.
A portion of the chart is highlighted (the drop zone) to indicate where the next data point must be selected.
11. Tap the position to set the endpoint of the wave.
The crest of the wave is labeled with the current wave count.
12. Repeat steps seven and eight until the wave is complete.

To adjust the wave crests

Mouse

1. Hover the mouse over the wave drawing.
Small circles denoting the crests of the waves appear next to the wave count labels.
2. Click and drag a circle to a new location on the chart.
A drop zone is highlighted to indicate where the wave crest can be placed.

Mobile or touchscreen


1. Tap the “No Tool” icon  to turn off the Elliott Wave drawing tool.
2. Tap the wave drawing.
Small circles denoting the crests of the waves appear next to the wave count labels.
3. Press and drag a circle to a new location on the chart.
A drop zone is highlighted to indicate where the wave crest can be placed.

To move the wave

Mouse

Click any of the wave lines and drag the entire drawing to a new location on the chart.

Mobile or touchscreen

1. Tap the “No Tool” icon  to turn off the Elliott Wave drawing tool.
2. Press and drag the wave to a new position on the chart.

To delete a wave

Mouse

1. Hover the mouse over the wave drawing.
2. Press the delete key.


Or

1. Right-click the wave drawing to open the context menu.
2. Select **Delete Drawing**.


Or

For a drawing in progress, press the escape key.

Mobile or touchscreen

1. Tap the “No  Tool” icon  to turn off the Elliott Wave drawing tool.
2. Tap the **X** icon.

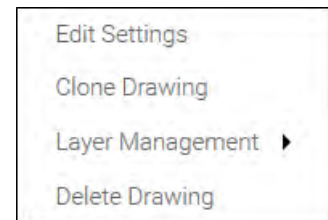
Or

For a drawing in progress, tap the “No Tool” icon. 



To manage a wave

Mouse

1. Right-click the wave drawing to open the context menu.
2. Select an item from the menu:
 - Edit Settings — Change the style of the wave (see [Style palette](#) below)
 - Clone Drawing — Make a copy of the wave drawing
 - Layer Management — Position the drawing (on the z-axis) above or below other drawings
 - Delete Drawing — Remove the drawing



Mobile or touchscreen

1. Tap the “No Tool” icon  to turn off the Elliott Wave drawing tool.
2. Tap the wave drawing.
3. Tap the gear icon. 
4. The style palette opens. Change the style of the wave (see [Style palette](#) below).





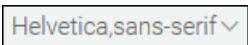
Customizing wave drawings



Figure. Elliott Wave style palette and configuration toolbar.

Style palette

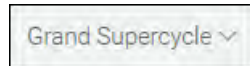
The style palette enables you to style wave lines and text to your preferences:

	Set the color of the wave lines and text
	Set the style of the wave lines, such as dashed or solid
	Italicize and boldface the wave labels
	Set the font size of the wave labels
	Set the font family of the wave labels

Note: To restyle an existing wave drawing, right-click the drawing and select **Edit Settings** from the context menu. On mobile or touchscreen, tap the drawing, then tap the gear icon.

Configuration toolbar

The configuration toolbar enables you to:



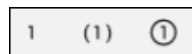
Select the wave magnitude, ranging from Grand Supercycle to Sub-Minuette



Choose the labeling style for impulse waves



Choose the labeling style for corrective waves



Set the type of wave label, such as a number enclosed in a circle



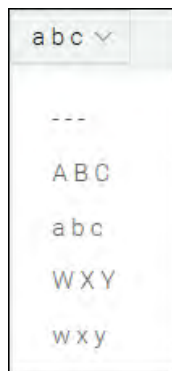
Select whether wave lines are drawn or not



Save all settings so they can be applied to new drawings

You can even draw just impulse waves or corrective waves.

To draw just impulse waves, select the - - - option from the **corrective** waves dropdown menu:



To draw just corrective waves, select the - - - option from the **impulse** waves dropdown menu:



Keyboard shortcuts

Drawing tools can be activated by keyboard shortcuts. See the [Accessibility](#) section for details.

Favorites

You can reduce the number of tools displayed on the drawing palette by creating a set of your favorites.

When the list view of the palette is active (see [Drawing palette controls](#)), a star appears next to each of the drawing tools. Select the star to mark the tool as one of your favorites and pin it to the top position in the tool list. **NEW v8.6**

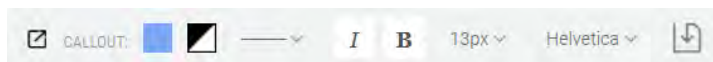
In grid view on desktop browsers, right-click a tool to open a pop-up window, then click the pop-up window to add or remove the tool as a favorite. Favorites are indicated by a star ornament in grid view.



To see only your favorites, select **Favorites** from the drawing palette dropdown menu.





Style palette



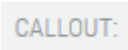





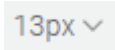
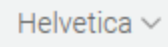



The style palette appears when a drawing tool is selected. The palette contains controls that enable you to set properties of the drawing tool, such as background color, line width, and font.

Properties vary among tools. For example, the annotation tool has font properties, but does not have background color or line width; the ellipse tool has background color and line width, but not font properties.


Style palette controls

Control	Description
	<p>Detaches the palette from the top of the screen, making the palette draggable anywhere on-screen.</p> <p>Drag the detached palette using the drag strip on the left side of the palette.</p> <p>Dock the palette by selecting the Attach control. </p>



	Identifies the currently selected tool (to which the styles apply).
	Sets the background color of the drawing.
	Sets the foreground or text color of the drawing.
	Sets the line width of the drawing.
	Sets the font in italics.
	Sets the font in boldface.
	Specifies the size of the font.
	Specifies the font family.
	<p>Saves the style palette settings (the configuration) of the selected tool. The tool retains the configuration even after the chart is closed.</p> <p>To restore the tool's default configuration, select the X next to the Save Config control.  </p>

Crosshairs +

Select the crosshairs icon  to show horizontal and vertical lines that follow the mouse. Crosshairs enable you to easily identify values on the x- and y-axes.

NEW v8.2 The crosshairs can show a stationary heads-up display (HUD) of information for the data point targeted by the crosshairs. The HUD is shown and hidden by the dropdown menu adjacent to the crosshairs icon.

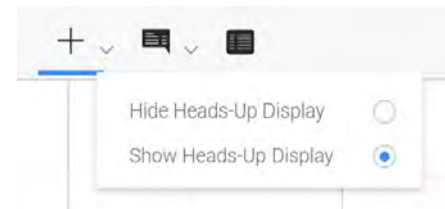



Figure. Crosshairs with stationary HUD.

Info display

Select the Info display icon  to show detailed information about individual data points. The default display shows, date, price, open, high, low, close, and volume. Data points are selected by moving the mouse over the time series.

NEW v8.2 The Info display can now be a dynamic callout or floating tooltip. The display type is selected from the dropdown menu next to the Info display icon.

Note: The Info display is not available on mobile devices.

The dynamic callout appears next to each data point as the user's mouse moves over the chart.

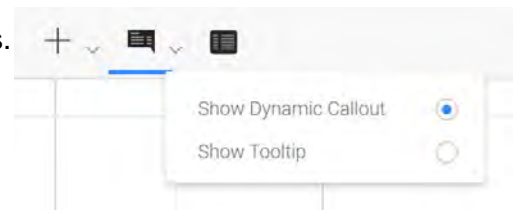


Figure. Info dynamic callout.

The floating tooltip follows the user's mouse across the chart, but the associated data point is indicated by a vertical highlight (or the crosshairs, if active).

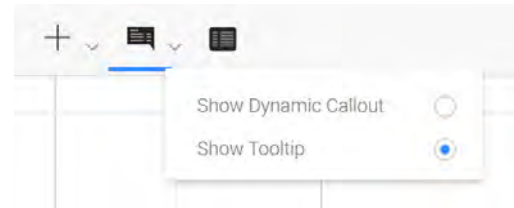
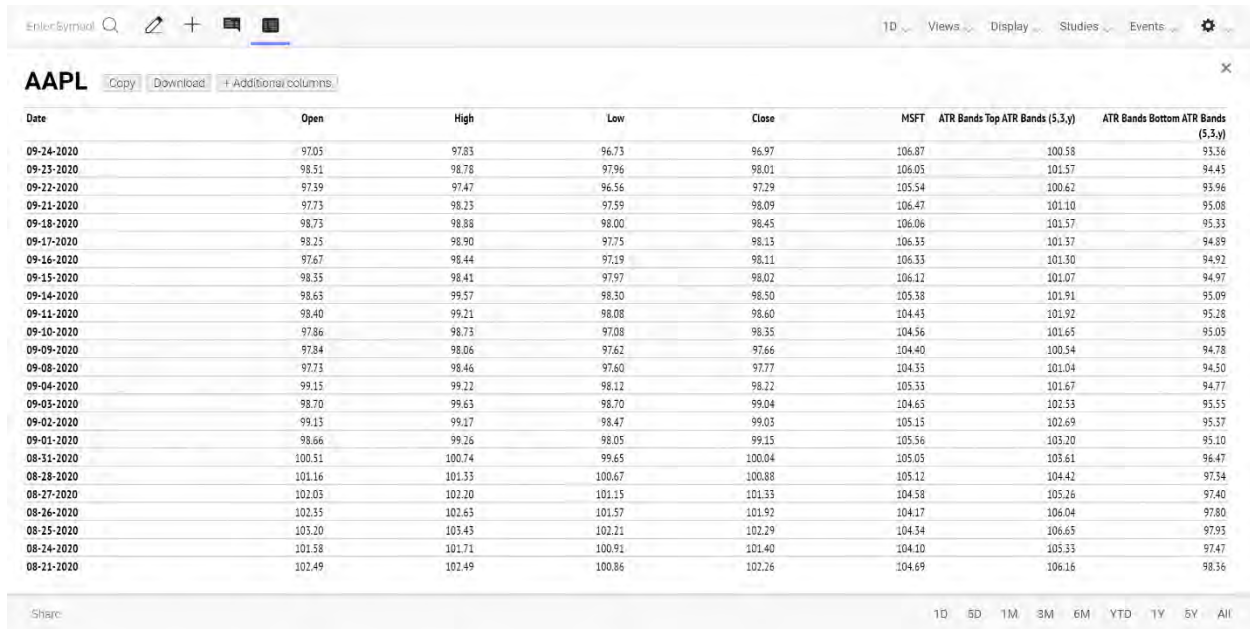


Figure. Info floating tooltip.

Table view

The Table View add-on creates an on-screen table that contains the same information as the graphical chart display, including study and comparison data. Table view enhances chart accessibility by enabling screen readers to read the line and study content shown on the chart.



The screenshot shows the FINECOX Table View interface for AAPL stock data. The interface includes a search bar, a toolbar with icons for search, add, and table view, and a table of data. The table has columns for Date, Open, High, Low, Close, MSFT, ATR Bands Top ATR Bands (5,3,y), and ATR Bands Bottom ATR Bands (5,3,y). The data is sorted by date, with the most recent data at the top.

Date	Open	High	Low	Close	MSFT	ATR Bands Top ATR Bands (5,3,y)	ATR Bands Bottom ATR Bands (5,3,y)
09-24-2020	97.05	97.83	96.73	96.97	106.87	100.58	93.36
09-23-2020	98.51	98.78	97.96	98.01	106.05	101.57	94.45
09-22-2020	97.39	97.47	96.56	97.29	105.54	100.62	93.96
09-21-2020	97.73	98.23	97.59	98.09	106.47	101.10	95.08
09-18-2020	98.73	98.88	98.00	98.45	106.06	101.57	95.33
09-17-2020	98.25	98.90	97.75	98.13	106.33	101.37	94.89
09-16-2020	97.67	98.44	97.19	98.11	106.33	101.30	94.92
09-15-2020	98.33	98.41	97.97	98.02	106.12	101.07	94.97
09-14-2020	98.63	99.57	98.30	98.50	105.38	101.91	95.09
09-11-2020	98.40	99.21	98.08	98.60	104.43	101.92	95.28
09-10-2020	97.86	98.73	97.08	98.35	104.56	101.65	95.05
09-09-2020	97.84	98.06	97.62	97.66	104.40	100.54	94.78
09-08-2020	97.73	98.46	97.60	97.77	104.33	101.04	94.50
09-04-2020	99.15	99.22	98.12	98.22	105.33	101.67	94.77
09-03-2020	98.70	99.65	98.70	99.04	104.65	102.53	95.55
09-02-2020	99.13	99.17	98.47	99.03	105.15	102.69	95.37
09-01-2020	98.66	99.26	98.05	99.15	105.56	103.20	95.10
08-31-2020	100.51	100.74	99.65	100.04	105.05	103.61	96.47
08-28-2020	101.16	101.33	100.67	100.88	105.12	104.42	97.54
08-27-2020	102.03	102.20	101.15	101.33	104.58	105.26	97.40
08-26-2020	102.35	102.63	101.57	101.92	104.17	106.04	97.80
08-25-2020	103.20	103.43	102.21	102.29	104.34	106.65	97.93
08-24-2020	101.58	101.71	100.91	101.40	104.10	105.33	97.47
08-21-2020	102.49	102.49	100.86	102.26	104.69	106.16	98.36

Figure. Chart data, including comparison and study.

To open the table view, select the **Table View** button. 

To copy the table data to the clipboard, select the **Copy** button.

To export the table data to a character-separated values file, select the **Download** button.

To display (and hide) data for Volume, % Change, and % Change vs Average, select the **Additional columns** button. A plus sign (+) appears on the button when the additional columns will be shown; a minus sign (-), when the columns will be hidden.

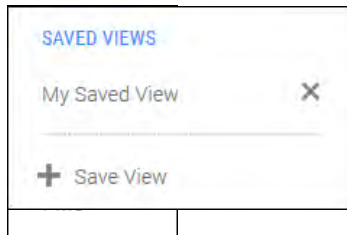


Chart Type menu

The **Chart Type** menu is divided into two sections: Chart Types and Aggregated Types.

The charting library supports a variety of chart types. Select a type to change the presentation of the time series data.

Chart types are the various ways that a chart can visually represent data; for example, as a candle, line, or mountain graph.

Aggregated types are charts that display data that has been modified through aggregation or recalculation; for example, Heikin Ashi, Kagi, and point and figure charts.

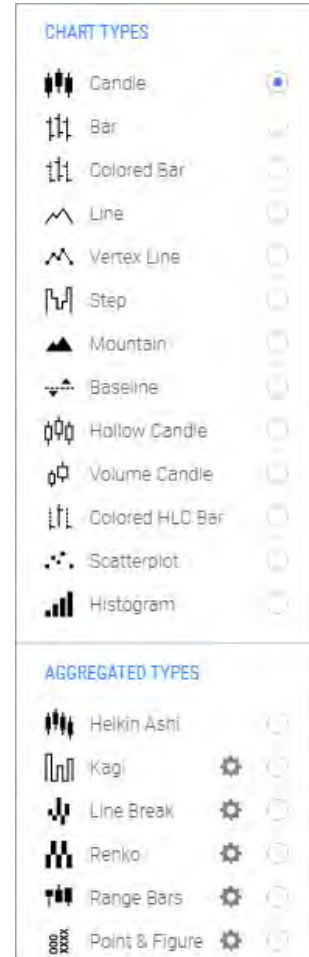
To customize a chart type:

1. Select the gear icon next to the chart type name.
2. Enter values in the dialog box that appears. For example, for Kagi charts:

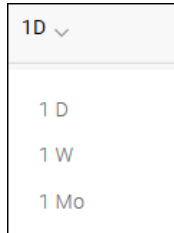


Select the **AUTO SELECT** button to let the chart determine the setting.

For more information on chart styles and types, see the *ChartIQ Charts and Studies* guide.



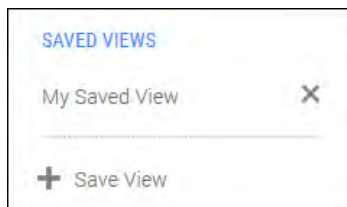
Periodicity menu



The amount of time represented by a data point (for example, a candle on a candle chart) is the periodicity of the chart.

Select the chart periodicity from the **Periodicity** menu. Periodicity can be seconds, minutes, hours, days, weeks, or months. Custom periodicities may also be added to the menu.

Views menu



A view is the chart display, including all indicators and studies associated with the chart. Use the **Views** menu to save chart views for later retrieval.

To save a view, select **+ Save View**.

To retrieve a saved view, select the view (for example, My Saved View) from the list of views.

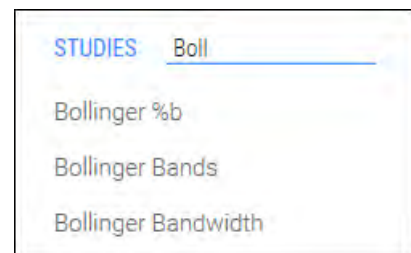
To delete a saved view, select the **X** next to the view name.

Studies menu

Studies are technical indicators that you add to charts from the **Studies** menu. For a complete list of the studies included in the ChartIQ library, see the *Charts and Studies* guide.

To add a study to a chart, select the study from the **Studies** menu.

To quickly find a study, enter the study name in the search field. As you enter the name, the list of studies is reduced to just those names that include the characters you entered.



Studies can overlay charts or appear in panels above or below charts. By default, some studies appear as overlays; some, in panels.

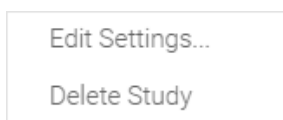
Overlays (and underlays, such as the Volume Underlay study) are studies that are superimposed on charts.



Figure. Alligator study overlaid on chart.

Overlay studies include a context menu that can be used to modify the study or remove it from the chart. To access the context menu:

- On desktop browsers — Highlight the study by hovering your mouse over the lines or shapes that make up the study. Right-click to open the context menu. Select an item from the menu.



- On touch devices — Tap the study to open the context menu. Tap the gear icon to edit study properties. Tap the X icon to delete the study.



Studies can appear in panels to separate the displays of multiple series.







Figure. Alligator, Aroon, and MACD studies in panels.

The vertical size of panels can be changed by dragging the panel top and bottom borders.

Panels include a toolbar that can be used to reposition or delete the panel. On desktop browsers, hover your mouse over a study to reveal the toolbar:



Secondary panel toolbar controls

	Moves the panel upward in a stack of panels. If the panel is at the top of the stack, positions the panel above the chart.
	Expands the panel and hides any other panels. Or, if the panel has been expanded, returns it to its former size and reveals all hidden panels.
	Moves the panel downward in a stack of panels. If the panel is at the bottom of the stack, positions the panel below the chart.
	Closes the panel and destroys the study.

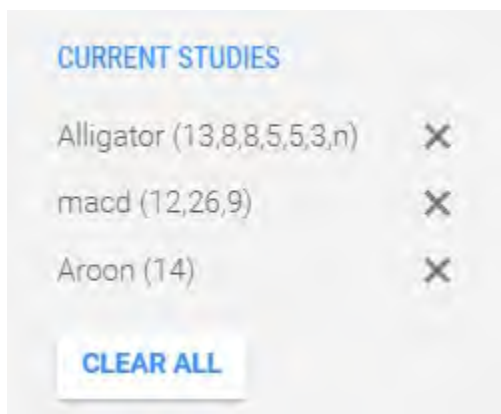
Drawings and annotations can be applied to overlay studies and studies in panels using the Drawing palette and Style palette tools.



Figure. Dashed line and annotation on MACD study in panel.

Study legends

A list of the studies applied to a chart is overlaid on the chart as a legend. The list of active studies is contained in the CURRENT STUDIES section of the **Studies** menu,



and in the Plots control, which appears on study panels or on charts when one or more studies overlays the chart.



NEW v8.8 Study plots and signals can be quickly switched on/off from the study legend, eliminating the need to go to a menu.

CURRENT STUDIES and Plots both enable you to edit and delete studies.

In CURRENT STUDIES, edit a study by selecting it from the list. Delete a study by selecting the **X** icon next to the study name. Delete all studies by selecting **CLEAR ALL**.

In Plots, select the gear icon to edit a study. Select the **X** icon to delete the study.

Drag and drop

Studies can be positioned and managed by drag-and-drop user interactions. Overlay studies can be dragged into panels. Studies in panels can be dragged onto charts as overlays. Studies can be combined in panels or on charts. See [Drag and drop](#) for more information.

Events menu

The Events menu enables you to display visual indicators of

- time-based events such as stock splits, dividend dates, financial filings, earning reports, and news events
- signals that appear when specific conditions are met for studies interacting with the primary series.

The indicators mark the date and time of an event. You can then select the indicator to see a description of the event or even a video related to the event.

SIGNALIQ

The SignalIQ section enables users to define signal events based on technical study patterns. For more information, see SignalIQ under Optional Products.

NEW v8.7 To display study event signals, select the slider for the ones you want to view.

To delete a saved signal, select the **X** next to the signal name.

You can also create your own signals.



To create a signal:

1. Open the **Events** menu.
2. Select **+ New Signal** in the **SIGNALIQ** section.
3. Configure the signal by creating conditions in the **New Signal** dialog:
4. Choose a study from the dropdown list; click the cogwheel icon (⚙️) to edit the study.
5. In the first row of the condition:
 - Select the first study component that will generate the signal (e.g., **MA 1**).
 - Select the event that will generate the signal (e.g., **Crosses Above**).
 - Select the second study component to compare to the first (e.g., **MA 3**).
6. In the second row of the condition:
 1. Select the signal type: **Chart Marker**, **(NEW v8.7) Paintbar**, or **(NEW v8.8) Emoji Marker**.
 2. Choose the signal color from the color palette.
 3. Select the marker shape: **Circle**, **Diamond**, **Square**, or **(NEW v8.8) Text**.
 4. Add a marker label either by typing any keyboard character in the box or **(NEW v8.8)** by choosing an emoji in the emoji picker.
 5. Select the marker size.
 6. Select the marker position relative to the primary series (e.g., **Above Line**).
7. Optionally, add a description that will appear when the signal is clicked.
 Note: **(NEW v8.8)** emojis can be added to description using shortcodes (e.g., :smile: = 😊).
8. Click the plus button (+) to add additional conditions as desired.
9. Name and save the new signal.

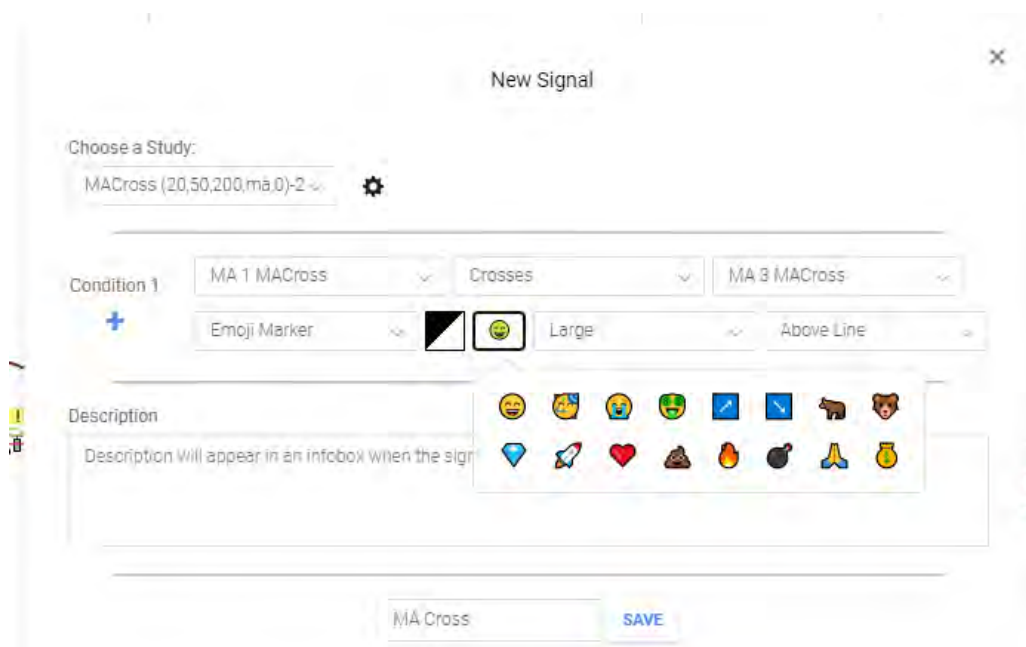


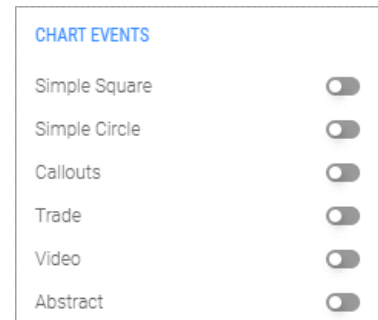
CHART EVENTS

The Chart Events section enables you to display visual indicators of time-based events such as stock splits, dividend dates, financial filings, earning reports, news events, and more.

The indicators mark the date and time of an event. You can then select the indicator to see a description of the event or even a video related to the event.

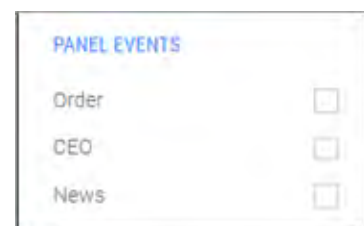
To display event indicators, select the slider for the ones you want to view:

- Simple Square — Marks events with a colored square and a letter that indicates the type of event
- Simple Circle — Marks events with a colored circle and a letter that indicates the type of event
- Callouts — Indicates events with a short text description or title
- Trade — Displays a small, filled circle at the data point where a trading event has occurred
- Video — Displays a video playback button to mark events
- Abstract — Indicates events with an image or animation



PANEL EVENTS

The **PANEL EVENTS** section of the menu applies to Life Cycle Events. See the [Life Cycle Events](#) section to learn more.



Preferences menu

Open the **Preferences** menu by selecting the cog wheel control. The menu enables you to set a variety of preferences to display your charts just the way you want them.

To set a preference, select the slider next to the preference name.

CHART PREFERENCES

Range Selector

The Range Selector preference opens a panel below the chart. The panel contains more data history than is shown in the primary chart. Drag the controllers in the range selector to control the viewable range of time in the primary chart.

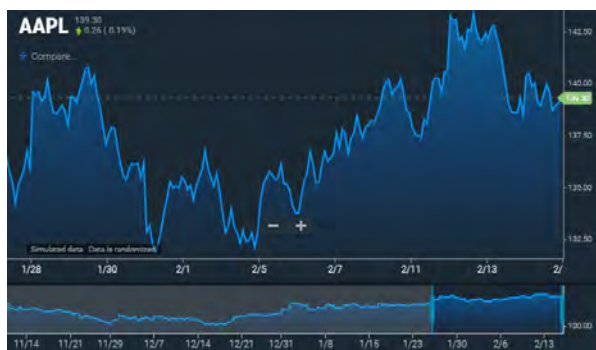


CHART PREFERENCES

Range Selector
Extended Hours

Y-AXIS PREFERENCES

Log Scale
Invert

ADDITIONAL FEATURES

Shortcuts / Hotkeys
Import Data

THEMES

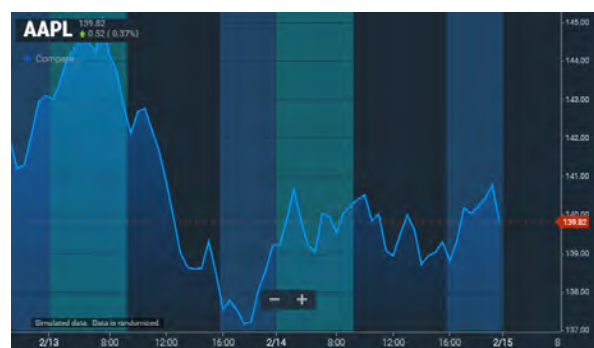
Day
Night
+ New Theme

LOCALE

Change Timezone
English

Extended Hours

The Extended Hours preference expands the trading hours of intraday charts to include pre- and post-session trading for U.S. equities. The pre- and post-sessions are highlighted with background shading. Extended hours are particularly useful for observing trading activity during earnings season.



Market Depth

(Only available with the Trade From Charts plug-in.)

The market depth display shows histograms of the volume of bids and asks at each price level if Level 2 data is provided. In addition, it shows an aggregate volume up/down from the current market to a given price. The graphic helps users understand if there is more pressure above or below the market.



L2 Heat Map

(Only available with the Trade From Charts plug-in.)

The heat map shows an overlay of the Bid/Ask depth of market at the close of the period. That is, for a one-minute chart it will show the volume on the bid at each price level in green and volume on the offer in red at each price level.



Y-AXIS PREFERENCES

Y-axis preferences enable you to configure the chart y-axis on a logarithmic scale or invert the price values.



Log Scale

On a logarithmic scale chart, the vertical spacing between two points corresponds to the percentage change between those numbers. Thus, on a log scale chart, the vertical distance between 10 and 20 (a 100% increase) is the same as the vertical distance between 50 and 100. Because these charts show percentage relationships, logarithmic scaling is also called percentage scaling. It is also called semi-log scaling because only the vertical axis is scaled logarithmically.

NEW v8.2 Charts automatically switch from a log scale to a standard y-axis when the data set includes y-axis values that are less than or equal to zero. The log scale is restored when the chart is refreshed, or new data is retrieved.



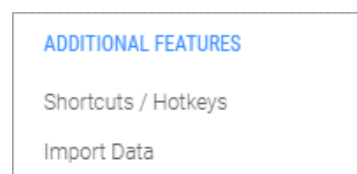
Invert

Inverting the y-axis simply flips the chart to display the lowest values at the top and highest values at the bottom. This will flip the primary line and any drawings or overlay studies applied to the line. **Note:** Each study line which is shown in its own panel may be flipped independently.




ADDITIONAL FEATURES

Shortcuts / Hotkeys



NEW v8.2

Shortcuts and hotkeys make chart functionality accessible from the keyboard (see Accessibility). The shortcuts legend displays all keyboard shortcuts and hotkeys.

To open the legend, either select **Shortcuts / Hotkeys** from the ADDITIONAL FEATURES section of the **Preferences** menu or click the keyboard icon () in the footer.

The shortcuts legend is a moveable, resizable window that can be minimized and dragged anywhere within the browser window, including outside the chart.

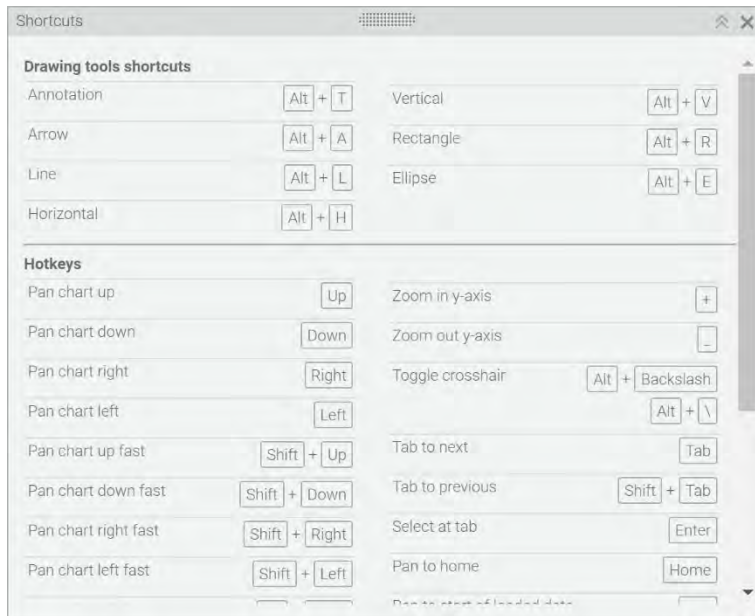


Figure. Shortcuts legend.

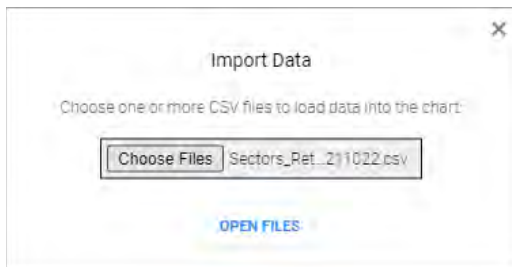
Import Data

NEW v8.6

The Import Data feature enables you to import files in CSV format and add them to a chart as data for a main or secondary series.

To import data:

1. Select **Import Data** in the ADDITIONAL FEATURES section of the **Preferences** menu.
2. In the **Import Data** dialog, select the **Choose Files** button.
3. Navigate to the file location, select the file(s) you want to import, and then click **Open**.
The box shows the number of files chosen for import.



4. Click **OPEN FILES**.

The Import Data dialog containing details of the imported file(s) appears.



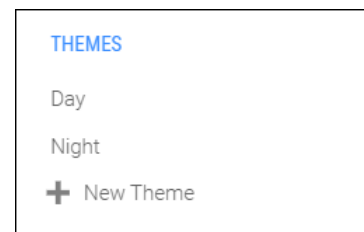
5. Modify the name for the imported data, set the desired periodicity, check the headers, and choose to display data as either the primary or secondary series.

THEMES

Themes set the foreground and background colors of the chart. The two built-in themes, Day and Night, set charts in light and dark colors, respectively.

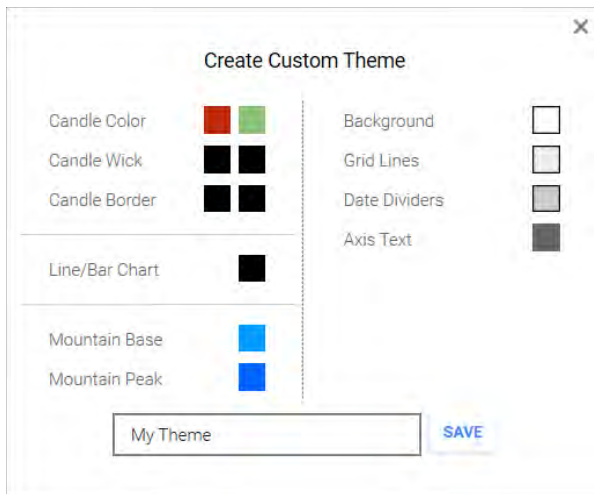
To choose a theme, select it from the THEMES section of the **Preferences** menu.

You can also create your own custom themes.



To create a custom theme:

1. Open the **Preferences** menu.
2. Select **+ New Theme** in the **THEMES** section.
3. Configure the theme by making color selections in the **Create Custom Theme** dialog box:

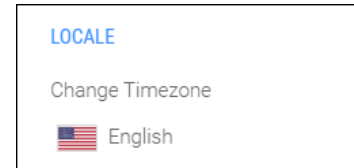


4. Enter a name for your theme in the input field, and then select **SAVE**.


Your theme will be listed in the **THEMES** section of the Preferences menu. To apply your theme to a chart, select it from the menu.

LOCALE

The locale settings enable you to present the user interface in a variety of languages and apply any time zone to the chart data.



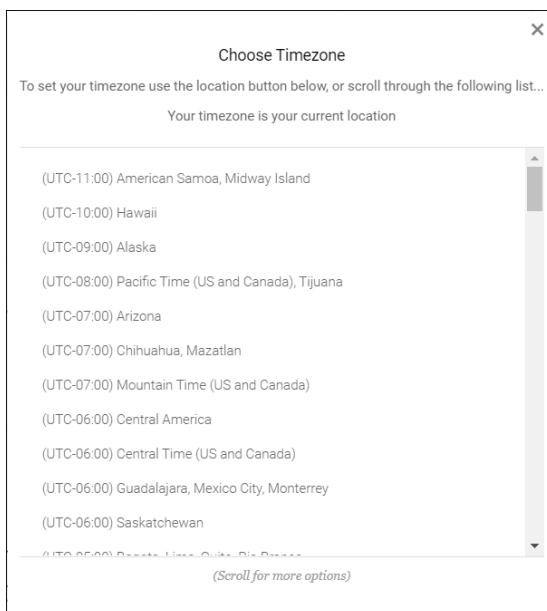
To choose a language:

1. Select the current language setting; for example,  English
2. Select a language from the **Choose language** dialog box:



To change the time zone:

1. Select Change Timezone
2. Select a time zone from the **Choose Timezone** dialog box



If the current time zone is different than that of your current location, the [USE MY CURRENT LOCATION](#) control appears in the dialog box. Select the control to set the time zone to your current location.

Share

The Share feature enables you to create an image of a chart and share the image by means of a URL.

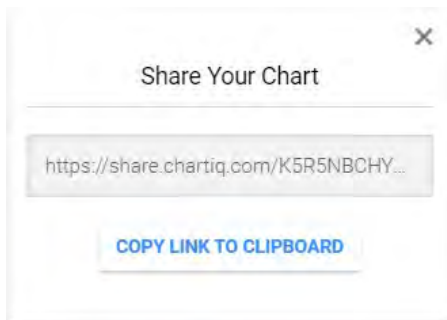
To share a chart image:

6. Select the **Share** control (at the bottom of the chart).
7. Select the **CREATE IMAGE** button in the **Share Your Chart** dialog box:



An image of your chart is saved to the ChartIQ sharing site.

8. Select the COPY LINK TO CLIPBOARD button in the Share Your Chart dialog box:



9. Paste your link into email message, documents, or texts to enable access to your chart image.

Time frame selector




The time frame selector (lower right corner of the chart) enables you to select various time periods for the chart — from one day to all the data available for the instrument.

Each selection automatically sets an appropriate periodicity so that the chart is filled with data. For example, if you select the **1D** time frame, the periodicity is set to 5 minutes; **6M**, one day; **All**, one month; and so forth.

Navigation

In general, navigation of the chart is easily done using direct manipulation or using controls provided.

Panning

A chart is panned (scrolled) by dragging the chart. When a chart is panned so that the most recent bar is hidden, a home  icon appears on the screen. Pressing the icon animates the chart back to the home position.


On desktop devices, grab the chart with the mouse and drag it left, right, up, or down.

The right and left arrow keys and Home and End keys also pan the chart (see [Accessibility](#)).

On laptop touchpads, a two-finger horizontal stroke will pan the chart left or right. On all devices, a swipe action will rapidly scroll the chart in the swipe direction, slowing with an easing animation.

On a touch device, a single finger touch will move the chart from side-to-side or up and down. When the crosshair is enabled, two fingers can be used to pan the chart.

Zooming

To zoom the entire chart, select the  and  buttons at the bottom of the chart;  to zoom in,  to zoom out.

On touch devices, pinch the screen to zoom out, press the screen with two fingers then spread the fingers apart to zoom in.

The up and down arrow keys also zoom the chart (see [Accessibility](#)).

The scale of the x- and y-axes can be zoomed by selecting either axis and dragging up or down for the y-axis or left or right for the x-axis.

SmartZoom



SmartZoom automatically changes the periodicity of the chart to maintain visual density of the data as you zoom the chart in and out. SmartZoom enables you to quickly go from one-second to yearly data increments and keep the chart packed with data.


To activate SmartZoom, select the SmartZoom control  (at the bottom of the chart).

The SmartZoom control appears only when the chart is configured to use the feature.

Full-screen display



The full-screen control enlarges the chart to fill the entire display area, hiding the browser chrome and removing the chart's top and bottom toolbars. Full-screen display provides a productive, uncluttered viewing experience on screens of all sizes.

On desktops, expand the chart to full screen by selecting the  control (at the bottom of the chart). Exit full-screen mode by selecting the control again, by pressing F11, or by pressing the Esc key.

Hidden outliers

Data sets often contain outliers: values that deviate significantly from the statistical norm.

With the hidden outliers feature, outliers are literally off the chart. Visual markers alert users to the presence of outliers and provide the interactive option of seeing the outlying portions of the chart.



Figure. Chart with hidden outliers.

To activate the hidden outliers feature, open the **Preferences** menu and select **Hide Outliers** from the **CHART PREFERENCES** section:



CHART PREFERENCES

Range Selector ☐


Extended Hours ☐

Hide Outliers ☐

Note: The Outliers add-on must be included in your charting application.

The upper outlier  and lower outlier  markers indicate the position of high or low outlier values. Select either type of marker to reveal the full range of the upper or lower portion of the chart, respectively.

Complementary controls appear in the upper and lower right corners of the screen.

Select the show control  in either corner (upper or lower) to show the respective outlying portion of the chart.

Select the hide control  to hide the outliers.

Study panels

Outliers can be hidden in study panels as well as the primary panel. When a chart has outliers, studies associated with the chart may have outliers too. The outliers cause display problems: the study lines, channels, or bars get compressed to fit into the display area, reducing detail.





Study outliers can be hidden—replaced by markers   that indicate the outlier location and value—making the study data trend clear. The markers can be selected to reveal the outliers. Controls at the top and bottom of the study's y-axis also show and hide the outliers.



Figure. Momentum Indicator with hidden outliers.

Multiple y-axes

Hidden outliers are supported on multiple y-axes; for example, when a comparison series has been added to a chart. The outliers for each series can be shown and hidden independently using the outlier controls on the respective y-axis.  





Selecting a high   or low   outlier marker in a series reveals the upper or lower portion of just that series.






Figure. Chart with comparison series and hidden outliers.

Drag and drop

Charting elements such as y-axes and series (studies and comparison) can be positioned and manipulated using drag-and-drop user interactions.

To drag and drop a charting element, do the following:

1. Click and hold or press the element until one of the drag-and-drop icons appears. The icon indicates the direction in which the element can be dragged:

	— Horizontally
	— Vertically
	— All directions

2. Drag the element to a container or boundary.

Charts, panels, and axes are containers. The edges of charts, panels, and axes are boundaries.

A blue rectangle appears when you drag to a container. A blue line appears when you drag to a boundary. The rectangle or line indicates the drop location.

Note: A blue rectangle or line must appear before you can drop an element. At the screen edges, be careful to drag and drop within the charting area. The drag-and-drop icon turns to the default pointer or disappears when you drag an element out of the charting area. If you drop an element outside the charting area, the drag-and-drop action does not take effect.

3. Drop the element by releasing the mouse button or lifting your finger or stylus from the screen.

Series

Study and comparison series overlay charts or appear in panels above or below charts.

Series can be managed with drag and drop. Overlays can be dragged into panels. Series in panels can be dragged onto charts as overlays. Series can be combined. The y-axis of a series can be positioned to the left or right of the series.

Procedures

Convert Overlay Series to Panel Series — Drag and drop an overlay series onto a chart boundary or panel boundary.

Convert Panel Series to Overlay Series — Drag and drop a panel series onto a chart.

Combine Series — Drag and drop multiple overlay series or panel series into a single panel. Or drag and drop series from multiple panels onto a chart.

Uncombine Series — Drag and drop a series from a panel (containing multiple series) onto a panel boundary or chart boundary or onto a chart. Or drag and drop an overlay series (from a chart containing multiple overlays) onto a chart boundary or panel boundary.

Position Panel Series — Drag and drop a panel series onto a chart boundary or panel boundary.

Position Y-Axis — Drag and drop the y-axis of a series onto the left or right boundary of the series. Or drag and drop the series onto its own left or right boundary. See the [Y-Axis](#) section below for additional features.

Y-Axis

The y-axis of charts and series can be positioned on the left or right of the chart or series, or on the left or right of other y-axes. Multiple y-axes can be combined into a single axis. All by drag and drop.

Multiple y-axes occupy the same chart or panel when charts are overlaid by series or series are combined in panels.

Procedures

Position Y-Axis on Left or Right of Chart — Drag and drop the chart y-axis onto the left or right boundary of the chart.

Position Y-Axis on Left or Right of Series — Drag and drop a series y-axis onto the left or right boundary of the series. Or drag and drop a series onto its own left or right boundary.

Position Y-Axis on Left or Right of Another Y-Axis — Drag and drop a y-axis onto the left or right boundary of another y-axis. Or drag and drop a series onto the left or right boundary of a y-axis contained in the same panel or chart.

Combine Y-Axes — Drag and drop a y-axis onto another y-axis. Or drag and drop a series onto a y-axis contained in the same panel or chart.

Uncombine Y-Axes — Drag and drop a series (whose y-axis is combined with another y-axis) onto its own left or right boundary or onto the boundary of a y-axis contained in the same panel or chart.

Add-on features

Chart Grid

The Chart Grid template displays up to 25 charts in a grid layout, enabling you to make side-by-side comparisons of multiple instruments and markets. The grid is designed to maximize the screen real estate devoted to the charts and minimize the number of on-screen controls and borders.

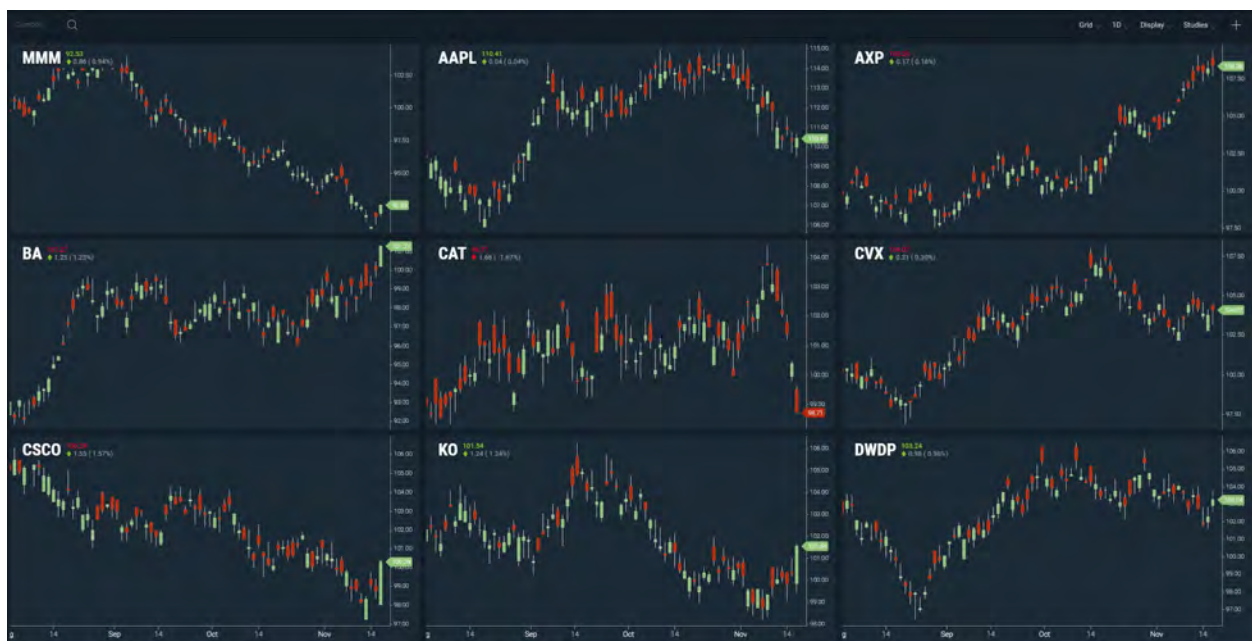


Figure. Grid of multiple charts.

Each chart displays its own time series data, but the grid is managed like a single chart. Selections from the periodicity, **Display**, and **Studies** menus update all charts in the grid simultaneously. The crosshairs control adds or removes crosshairs on every chart; the crosshairs move in unison across all charts. Scrolling any chart left or right scrolls all charts left or right.

Select the grid size

The Grid control enables you to select the size of the chart grid. The control is similar to graphical controls used to create tables in word processors.



To create a chart grid:

1. Select the Grid control (release the mouse button)
2. Move your mouse down and to the right to expand the grid, up and to the left to contract the grid
3. Click the control to set the size of the grid

Change a chart symbol

Each chart in the grid displays a time series that is independent of the other charts.

To change a chart symbol:

1. Select a chart in the grid
2. Select the symbol search control
3. Enter a new symbol

Accessibility

Keystroke alternatives provide access to chart functionality without using a mouse or touchscreen.

Chart area

Keystroke	Functionality
=, or + on numeric keypad	X-axis zoom in
- (hyphen), or - (minus) on numeric keypad	X-axis zoom out
+ (Shift + equal)	Y-axis zoom in (if pressed on numeric keypad, x-axis zoom in)
_ (Shift + hyphen)	Y-axis zoom out
Right arrow*	Scroll chart right one bar or, if crosshairs enabled, move crosshairs one bar right
Left arrow*	Scroll chart left one bar or, if crosshairs enabled, move crosshairs one bar left
Up Arrow*	Scroll chart up 2% of the chart height or, if crosshairs enabled, move crosshairs up 2% of chart height
Down Arrow*	Scroll chart down 2% of the chart height or, if crosshairs enabled, move crosshairs down 2% of chart height
Shift + Right Arrow*	Scroll chart right 10 bars or, if crosshairs enabled, move crosshairs right 10 bars
Shift + Left Arrow*	Scroll chart left 10 bars or, if crosshairs enabled, move crosshairs left 10 bars
Shift + Up Arrow*	Scroll chart up 20% of the chart height or, if crosshairs enabled, move crosshairs up 20% of chart height

Shift + Down Arrow*	Scroll chart down 20% of the chart height or, if crosshairs enabled, move crosshairs down 20% of chart height
Page Up or Alt + Right Arrow	Scroll chart right by the maximum number of bars on screen
Page Down or Alt + Left Arrow	Scroll chart left by the maximum number of bars on screen
Home	Scroll to the end of the chart (right-most candle) and reset the vertical zoom
End	Scroll to the beginning of the chart (left-most candle) as loaded Note: If the chart is using a quote feed, more data loads
Delete or Backspace	Undo the active drawing (if in the process of drawing) or delete a highlighted item
Escape	Undo the active drawing (if in the process of drawing) or close an open menu
Tab	Move focus to the next user interface element on the chart, and to browser controls outside of the chart UI such as the address bar NEW v8.6
Shift + Tab	Move focus to the previous user interface element
Enter/Return	Select (activate) the currently focused user interface element
Alt + \	Show/hide the crosshairs and static information display
Alt + 0	Show/hide the continuous zoom (if enabled)
Shift + Alt + L	Select the symbol lookup NEW v8.3

Add-ons **NEW v8.3**

Shift + Alt + R	Show/hide the range slider
Shift + Alt + X	Show/hide extended hours
Shift + Alt + O	Show/hide outliers
Shift + Alt + / or Shift + Alt + ?	Show/hide the keyboard shortcuts legend
Alt + K	Show the table view (press the Escape key to hide table view)
Plug-ins <i>NEW</i> v8.3	
Shift + Alt + D	Show/hide market depth
Shift + Alt + M	Show/hide the L2 heat map
Shift + Alt + P	Show/hide Trade From Chart

*Values are configurable; and so, may not be the same as the values shown.

Drawing

The example templates (such as *technical-analysis-chart.html* and *basic-chart.html*) include the following keyboard shortcuts for activating drawing tools when the drawing palette is open:

Tool	PC	Macintosh
Line	Alt + l	Option + l
Horizontal (line)	Alt + o	Option + o
Vertical (line)	Alt + p	Option + p
Annotation	Alt + w	Option + w
Rectangle	Alt + r	Option + r
Arrow	Alt + a	Option + a
Ellipse	Alt + e	Option + e

Note: Do not include the Shift key in the shortcut.

Dialogs & UI Controls

NEW v8.4

Keystroke	Functionality
Right/left arrow	Move in dialog elements that support a cursor
Escape	Close an open dialog
Tab	Move focus to the next dialog or UI control element
Shift + Tab	Move focus to the previous dialog or UI control element

Enter/Return	Select (activate) the currently focused dialog or UI control element (e.g., open a color palette or press a button)
Space	Toggle the currently focused element selection (e.g., turn an option on/off)

Optional Products

Active Trader + Trade From Chart

The Trade From Chart feature within the Active Trader module enables you to construct and execute trades right from the chart. In addition to simple order types such as market orders, the charting library supports construction and execution of complex, multi-leg conditional orders (OCO, OTO, OTO linked to OCO, etc.). With a simple drag-and-drop interface, you can place stop and limit orders with automatically calculated risk/reward ratios. Filled and pending orders can also be plotted on the chart, enabling you to see historical trades, current positions, and pending orders with the ability to click and modify.

The Trade From Chart module works seamlessly across desktop, tablet, and phone, so if an order is placed at your desktop, you can check or modify or replace orders from a mobile device.

Life Cycle Events

Many events have a life cycle — a beginning, middle, and end; events such as institutional trades (which take hours and comprise multiple transactions), CEO tenures, economic trends, weather events, and so forth. The Life Cycle Events module tracks and graphically displays life cycle events, including ongoing events.

Note: Life Cycle Events is a plug-in module; it is not part of the standard product.

Life cycle events occur over a span of time. They are depicted on charts in two ways, as a horizontal bar or as an icon followed by a dashed line (or tail). Both depictions show the start, end, and duration of an event.



Figure. Chart with life cycle events.

View life cycle events

Life cycle events are displayed in a panel below the chart.

To open the panel:

1. Open the **Events** menu.
2. In the **PANEL EVENTS** section, select the types of events you want to view.

Each event type appears in its own swim lane (horizontal band) of the panel. The y-axis of the panel identifies the swim lanes by event type.

To close the panel:

1. Open the **Events** menu.
2. Clear all check boxes in the **PANEL EVENTS** section.

CHART EVENTS	
Simple Square	<input type="radio"/>
Simple Circle	<input type="radio"/>
Callouts	<input type="radio"/>
Trade	<input type="radio"/>
Video	<input type="radio"/>
Abstract	<input type="radio"/>
None	<input checked="" type="radio"/>

PANEL EVENTS	
Order	<input type="checkbox"/>
CEO	<input type="checkbox"/>
News	<input type="checkbox"/>


View event information



Life cycle events are related to the chart time series. To highlight the time span of a life cycle event on the chart, hover your mouse over the life cycle event marker. Click the marker to make the highlighting remain on-screen. Click the marker again to make the highlighting respond to hovering the mouse.

Hovering the mouse over a single event or duration event displays a tooltip containing the event headline. Selecting an event marker shows the event headline and story in a pop-up display. Select the pop-up display to close it.



Figure. Highlighted life cycle event time span with tooltip and pop-up display.

Life cycle event markers can be custom icons. For example, an alert icon  could denote events that require special attention.

Life cycle events also indicate when an event is ongoing with a special symbol (such as  or ) at the most recent data point for the event.

The highlighting of trade execution events includes horizontal dashed lines that connect the starting and ending trades of an order with values on the y-axis.

Event zoom

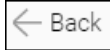
Double click an event in the swim lane to zoom in from a broad periodicity to a finer level of detail to see more granular data. Restore the previous state using  the button.



Figure. Life cycle events at default periodicity.



Figure. Zoomed-in view of a life cycle event.

Subevents

Life cycle events often have subevents; for example, an institutional order may include multiple trade executions.

To display information about life cycle subevents:

1. Select the life cycle event marker

The time span of the event is highlighted on the chart and any subevents are indicated by a small circular marker.

2. Select a subevent marker

A pop-up display opens, containing information that summarizes the subevent. Select the pop-up display to close it.

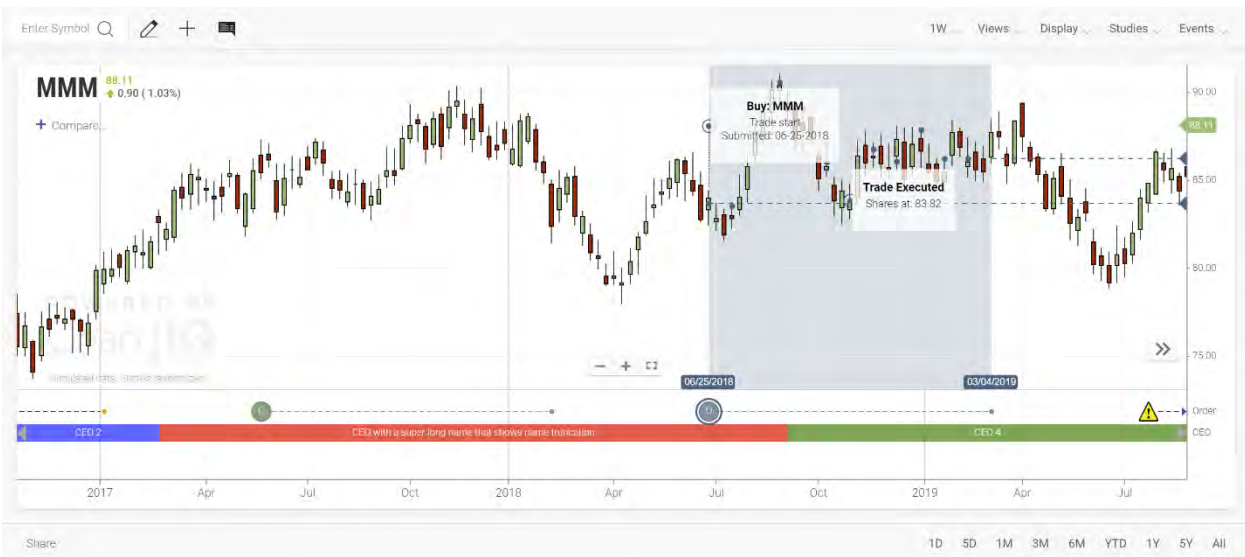


Figure. Highlighted life cycle event time span with subevent pop-up displays.

SignalIQ

New v8.6 The SignalIQ plug-in enables chart users to incorporate visual signals highlighting event occurrences in their technical analysis. Unlike alerts, which appear only when they occur and don't stay on the chart for users to view, SignalIQ uses chart markers and paintbars to display events, which allows users to add signals for historical evaluation as well as ongoing analysis.

You can easily identify and analyze salient market actions by constructing custom rules using any of our available studies. Event signal conditions are defined using any of 11 events (e.g., Is Greater Than, Crosses, Increases, etc.) and marker shape, size, position, and label are customizable.



Figure. Chart events appear as circles on the RSI study and diamonds on the chart; green markers show when RSI crosses above 50, yellow markers show when RSI crosses below 50. The panel containing the underlying study can be shown/hidden by clicking a marker highlighted on hover.

Technical Analysis: Data Forecasting

Data Forecasting enables visualization of predicted trends. Forecasting data is appended to historical data in chart series and studies, extending the series or study into the future.

Forecasts can be appended to past dates to show the accuracy of past forecasts. A forecast can include a range of outcomes which may be displayed as a projection cone. Forecasting data can be displayed in a variety of line styles and colors to distinguish the forecast portion of a series or study from the historical data.



Figure. Multiple plots with forecasts in various styles.

Note: Data Forecasting is included in the Technical Analysis product. It is not part of the Core Charts product.

Term Structure

Term structures are graphs of financial instrument values ordered by date of delivery. An interest rate yield curve is a type of term structure; yield is ordered by maturity date.

The Yield Curve chart compares U.S. Treasury yields at various maturity dates. The curve can display bid or ask prices or the midpoint of the price spread (the difference between the bid and ask) at each maturity date.

The Yield Curve chart can compare multiple series of instruments (creating multiple curves) and display curve spreads: the difference in values between curves and between instruments on the same curve.

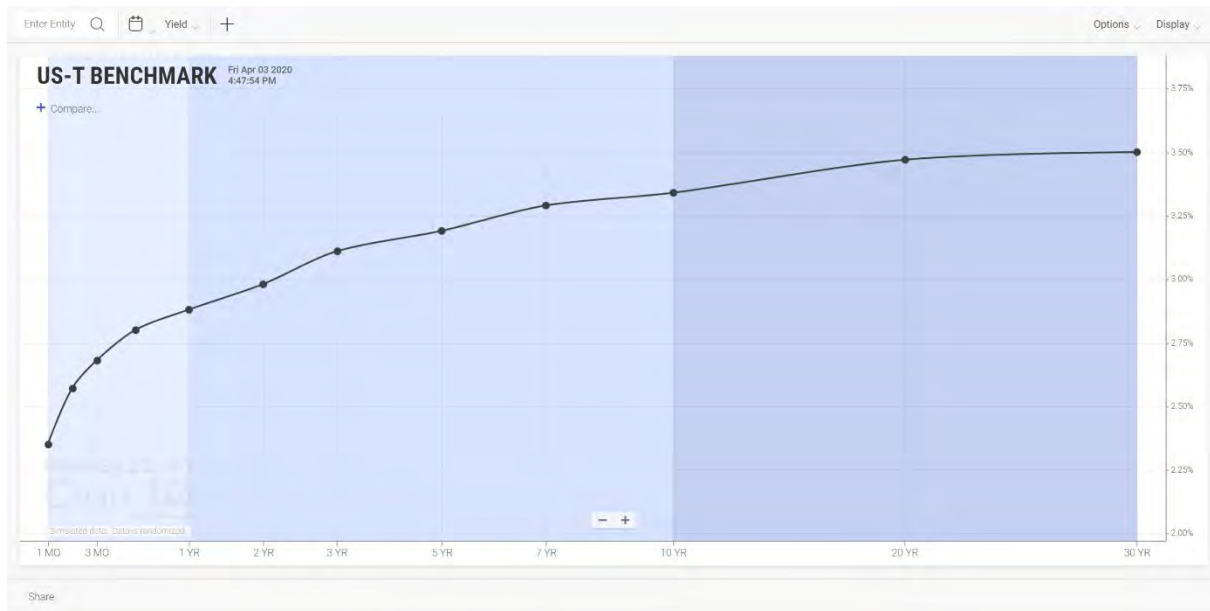
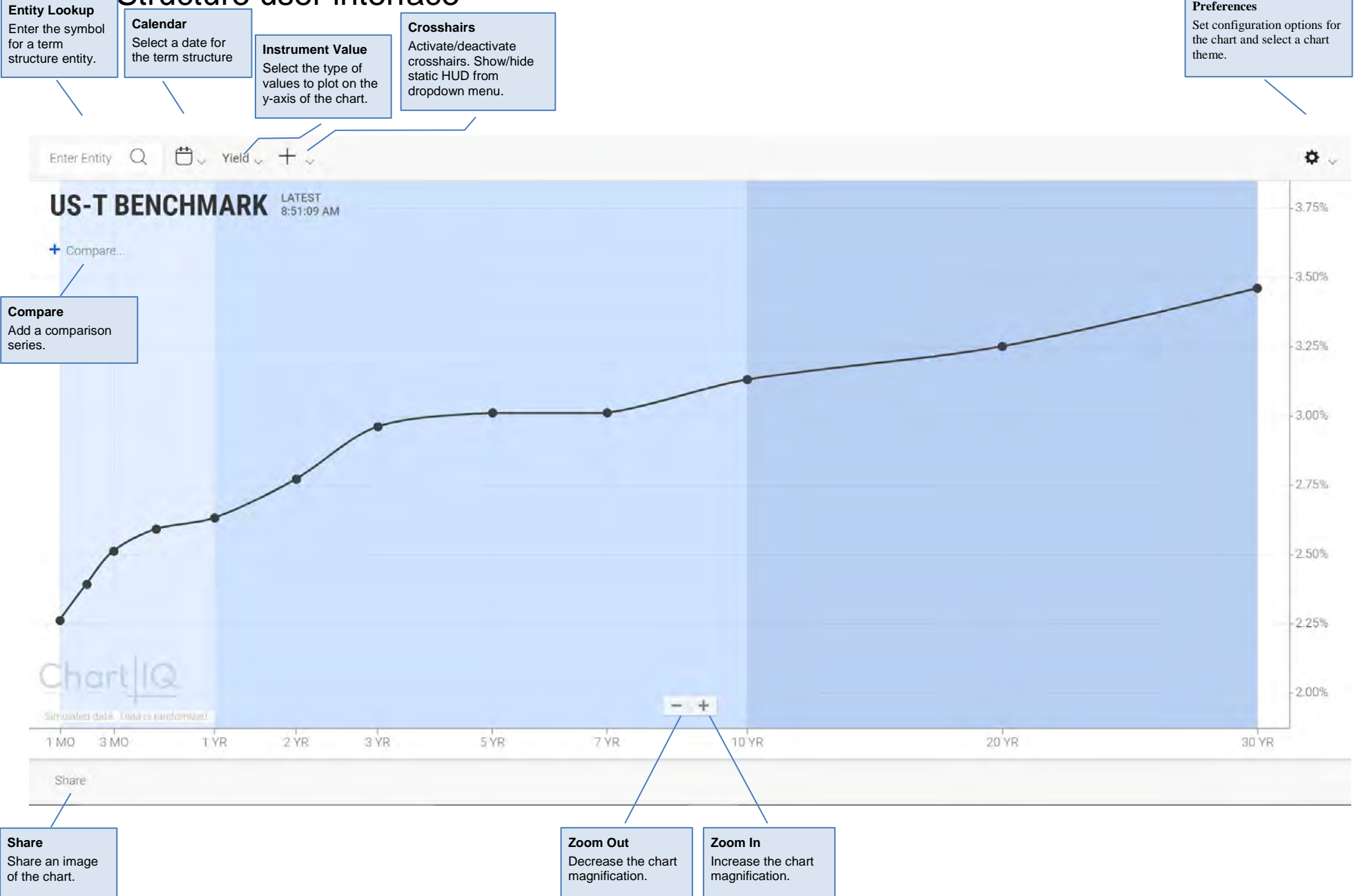


Figure. U.S Treasury yield curve.

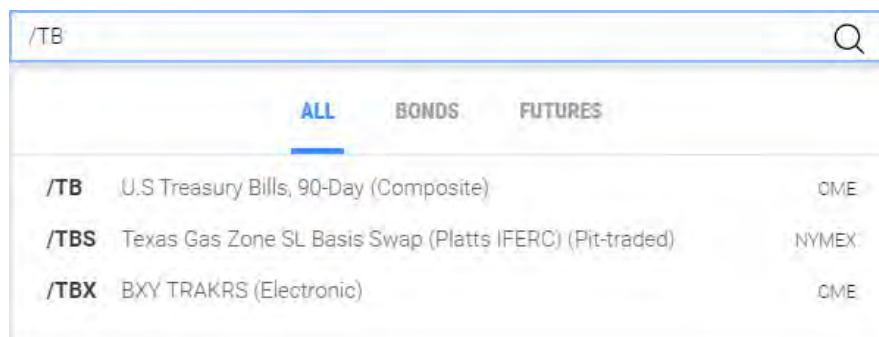
Note: Term Structure is a standalone package or a plug-in module to the Technical Analysis package; it is not part of the Core Charts package.

Term Structure user interface



Entity lookup

Find term structure entities (bond issuers and futures contracts) by entering the symbol that represents the instrument in the entity lookup field.



/TB		
ALL BONDS FUTURES		
/TB	U.S Treasury Bills, 90-Day (Composite)	CME
/TBS	Texas Gas Zone SL Basis Swap (Platts IFERC) (Pit-traded)	NYMEX
/TBX	BXY TRAKRS (Electronic)	CME

To find an entity:


1. Select the magnifying glass icon or the entity input field.
2. Select one of the instrument categories (**BONDS** or **FUTURES**) to limit your search. To search all categories of instruments, select **ALL**.
3. Enter the instrument symbol (“/TB” in the example above).
As you enter a symbol, the list of instruments is refined to successively approximate the input.
4. Select an instrument from the list, or press **Enter** to select the symbol in the text input field.

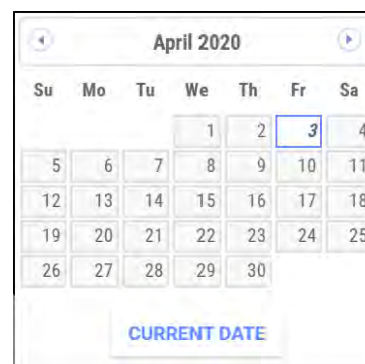
Alternatively, begin typing a symbol anywhere in the chart area; the entity lookup field opens automatically.

Calendar

Use the calendar to select the date for the term structure. The instrument values for that date are plotted on the chart.

To choose a date:

1. Select the calendar icon  to open the calendar
2. Use the forward and back arrows to scroll the calendar months
3. Select a day of the month or select **CURRENT DATE**.
4. Select the calendar icon to close the calendar



April 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

CURRENT DATE

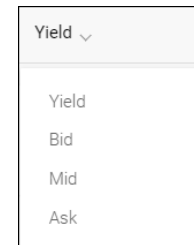
NEW v8.2 The calendar changes the dates of entity comparison curves along with the date of the primary curve.

Instrument value

The values of the term structure instruments are plotted on the y-axis.

To select an instrument value:

1. Open the instrument value menu.
2. Select a type of value.



Crosshairs +

Select the crosshairs icon to display crosshairs that follow your mouse and snap to points on the graph.

NEW v8.2 The crosshairs dropdown menu enables you to show or hide a heads-up display (HUD) that presents data for all curves for the term selected by the crosshairs.

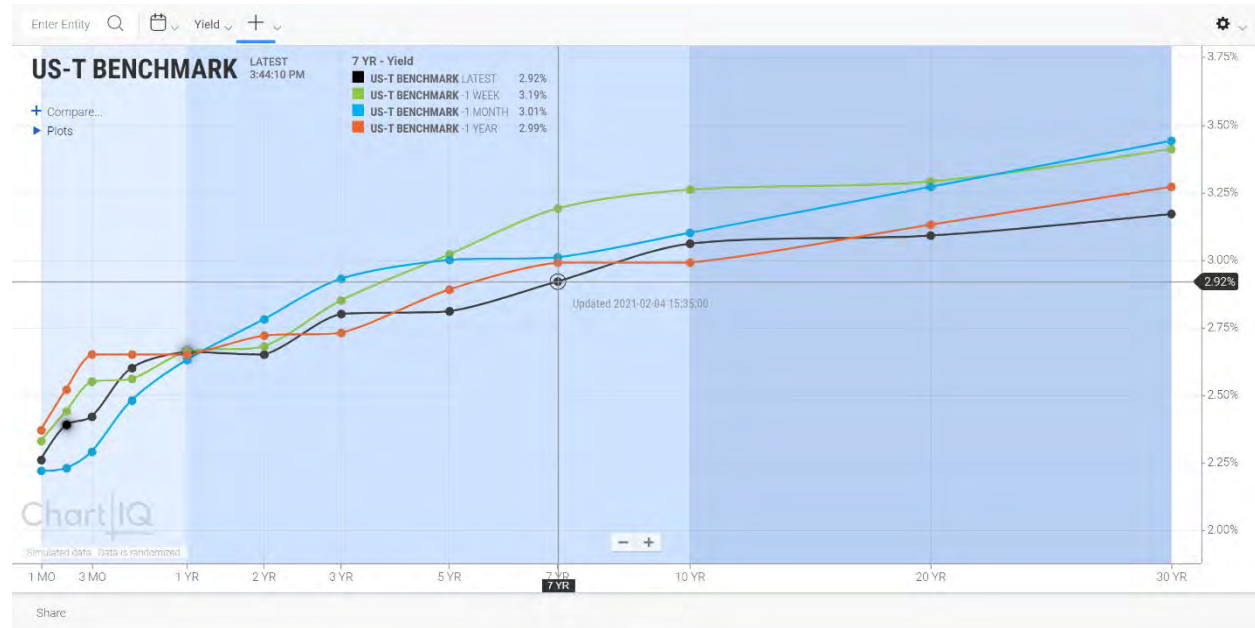


Figure. Term structure chart with historical curves, crosshairs, and HUD.

Preferences

The **Preferences** menu enables you to configure the look and feel of the chart.

OPTIONS

Shading

The chart background shading indicates short-, mid-, and long-term delivery dates of the term structure.

Select the **Shading** check box to turn shading on; clear the check box to turn shading off.

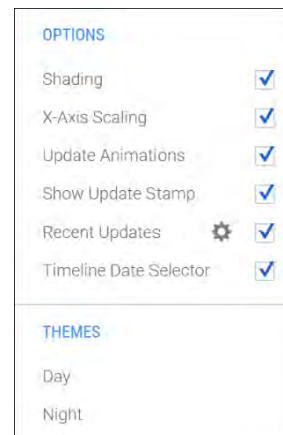
X-Axis Scaling

The delivery dates of term structure instruments are not always evenly spaced. For example, the bond yield curve includes 1-month, 3-month, 6-month, 1-year, 2-year, 3-year, 5-year, 7-year, 10-year, and 30-year dates.

To help represent the uneven spacing of dates, Term Structure provides scaling of the x-axis; points on the axis are spaced in proportion to the time between dates. The scaling isn't exact, rather it's an approximation to give a sense of the intervals between delivery dates.

The chart also provides fixed spacing in which the delivery dates are all spaced evenly regardless of the time between them.

Select the **X-Axis Scaling** check box to turn scaling on; clear the check box to turn scaling off.



OPTIONS	
Shading	<input checked="" type="checkbox"/>
X-Axis Scaling	<input checked="" type="checkbox"/>
Update Animations	<input checked="" type="checkbox"/>
Show Update Stamp	<input checked="" type="checkbox"/>
Recent Updates	<input checked="" type="checkbox"/>
Timeline Date Selector	<input checked="" type="checkbox"/>

THEMES	
Day	
Night	

Update Animations

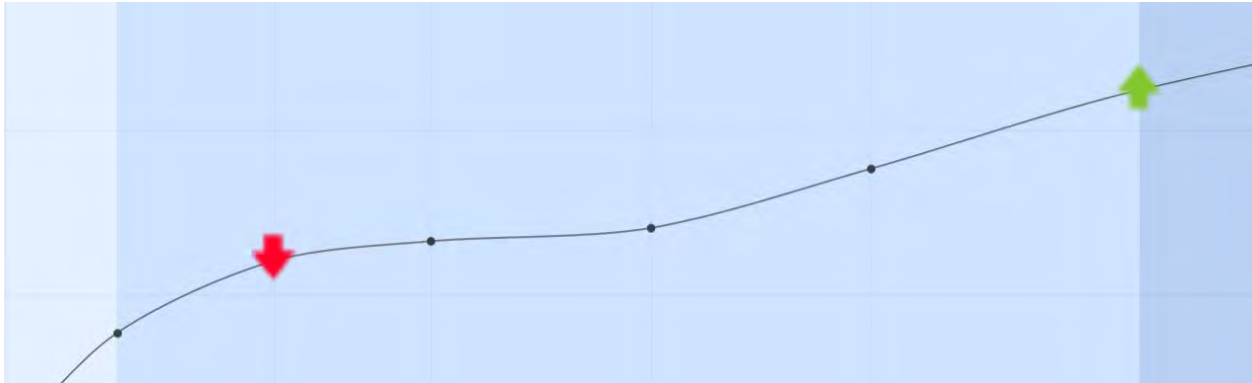


Figure. Animations indicating instrument updates.

The chart can display animations to draw attention to data points that have just been updated.

Select the **Update Animations** check box to turn animations on; clear the check box to turn animations off.

Show Update Stamp



Figure. Last update time stamp.

Trades and other actions continually change the values plotted for term structure instruments. A time stamp of the most recent update keeps you informed about an instrument's activity. When your mouse hovers over a data point, a tooltip appears, displaying the date and time of the most recent update.

Select the **Show Update Stamp** check box to turn time stamps on; clear the check box to turn time stamps off.

Recent Updates

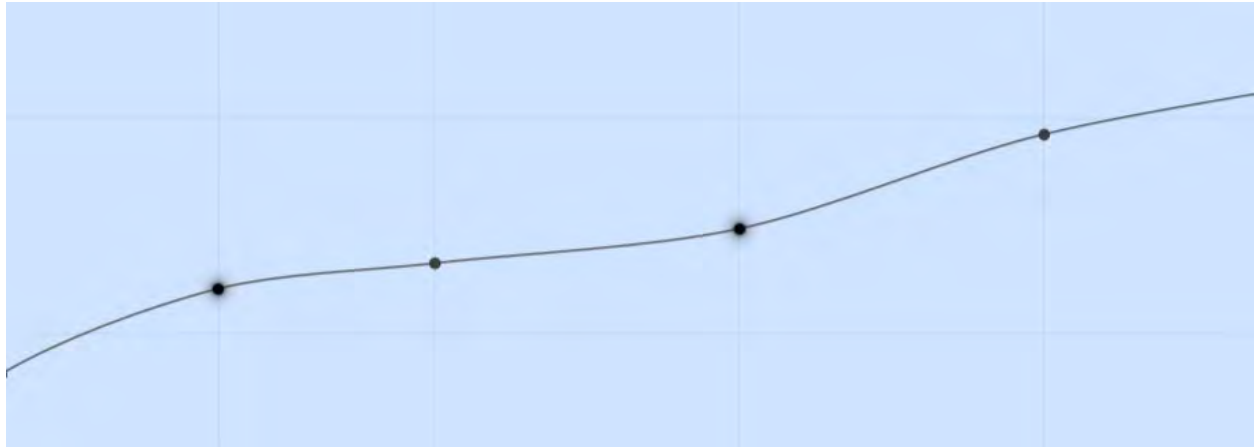


Figure. Recently updated data points highlighted with a diffuse outline.


Term structure charts can highlight data points that have been updated within a specified time span, such as the last 10 minutes. The highlighting helps users quickly spot instruments whose values are actively changing and instruments whose values have gotten stale.

Select the **Recent Updates** check box to turn highlighting on; clear the check box to turn highlighting off.

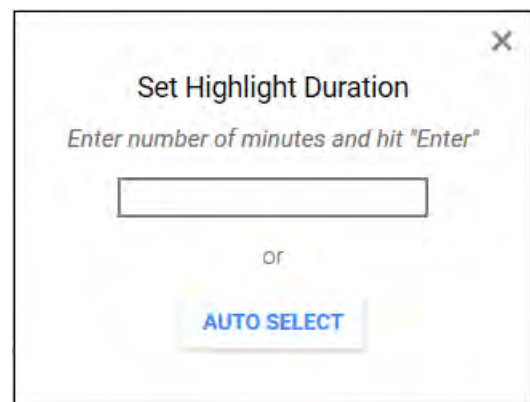
Set Highlight Duration

You can set the time span that determines whether instrument updates are recent, or fresh. Any data point that has been updated within the time span (for example, the last 10 minutes) is highlighted.

To set the highlight duration:

1. Select the cog wheel icon  next to **Recent Updates** in the **OPTIONS** section of the **Preferences** menu.
2. Enter a number of minutes in the **Set Highlight Duration** dialog box, and press **Enter**.

To set the default time span (currently, 10 minutes), select **AUTO SELECT**.



Timeline Date Selector

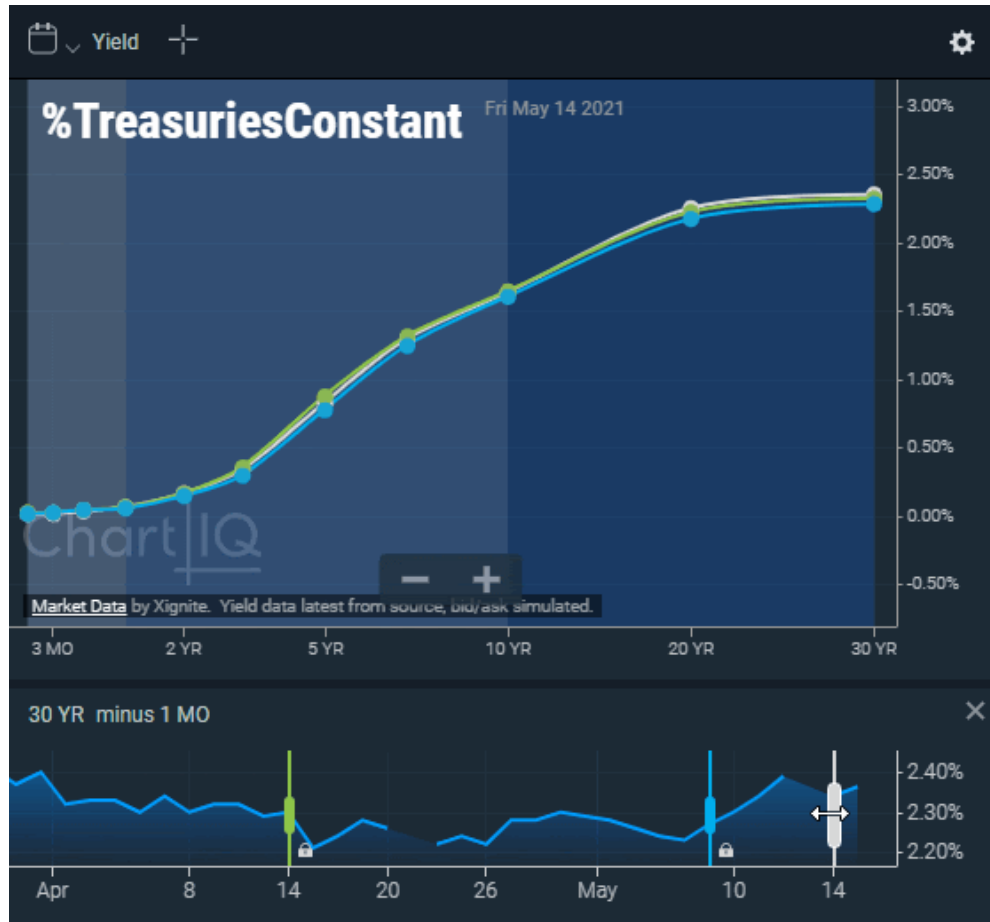
NEW v8.3

Figure. Term structure chart with Timeline Date Selector.

Term structure charts now have an option to display a Timeline Date Selector, which plots a mountain chart of spreads over time and allows the user to visually select the dates of curves to be displayed. The Timeline Date Selector is activated from the Preferences menu (cogwheel, top right).

The historical data displayed in the Timeline Date Selector is a spread of two points on the curve. In the example of a yield curve, a spread is the difference in yield or price of debt instruments of varying maturities (e.g., the difference in yield between the 10YR and 5YR bonds). Each point of the mountain chart shows the spread between two instruments on a particular date. The instruments for which the spreads are plotted are selected from the Timeline Date Selector dropdown menus.

Handles (slider controls) enable the selection of the dates shown for the main curve and related historical curves. The color of each handle corresponds to the color of the related curve — white (night theme) or black (day theme) indicates the main curve. For example, when the main curve handle is moved to April 26th, the main term structure curve is plotted for April 26th. If a relative

historical curve is set at one month before the main curve, the historical curve is plotted for March 26th.

Relative historical curves are locked to the main curve; their dates differ from the date of the main curve by a set amount of time regardless of how the date of the main curve changes. Historical curves can be unlocked from the main curve, and their handles can then be dragged independent of the main curve handle, even ahead of the main curve handle. The date in the plots menu updates as an historical curve handle is dragged.

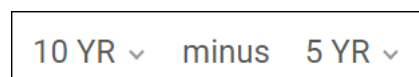
Any unlocked historical curves are plotted for the date indicated by the position of their handles in the Timeline Date Selector.

Custom historical curves are independent of the main curve when created but can be subsequently locked to the main curve.

Note:

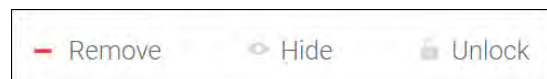
- The Timeline Date Selector chart applies only to the main curve and historical comparison curves. Spreads are not created for entity comparison curves. However, as the main curve handle is moved along the timeline, entity comparison curves (along with the main curve) change to reflect the selected date.
- Additional spread information can be obtained by selecting two points on the main curve, historical curves, or entity curves to see the spread between any two instruments.

Menus



Spreads are specified by selecting instruments from the Timeline Date Selector's dropdown menus.

Toolbar



A toolbar below the Timeline Date Selector chart contains the following toggle controls:

Add/Remove — Adds an historical curve to the term structure chart or deletes the curve from the chart.

Show/Hide — Shows or hides the historical curve on the term structure chart. When the historical curve is hidden, the plot legend item related to the curve and the curve's handle on the Timeline Date Selector are dimmed.

Lock/Unlock — Locks the historical curve chronologically to the main curve, or unlocks the historical curve from the main curve. When the historical curve is unlocked, its handle can be

dragged independent of the main curve handle. When the historical curve is locked, the curve handle cannot be dragged; the handle moves in tandem with the main curve handle.

Note: The **Add** control appears by default. When an historical curve handle is selected, **Remove** replaces **Add**, and **Show/Hide** and **Lock/Unlock** appear.

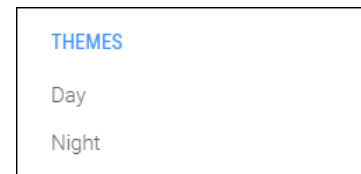
Y-Axis

The y-axis of the Timeline Date Selector (and term structure chart) can be position on the left or right side of the chart using drag-and-drop.

THEMES

Charts can be displayed in different color themes — Day for light colors; Night, for dark.

To choose a theme, open the **Preferences** menu, and then select a theme from the **THEMES** section.

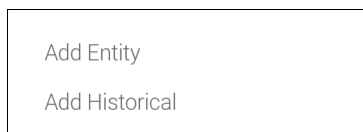


Compare

The Compare feature enables you to see multiple curves on screen simultaneously.

To add a curve, select the **+ Compare...** control.

The following menu opens:



Add an entity curve

Entities are collections of instruments that are comparable to the main curve.

To add an entity to the chart, select **Add Entity** from the **Compare** menu.

The entity lookup dialog box opens:

ALL BONDS FUTURES

%TIBORs	TIBORs	Gov't Bond
%TAIBORs	TAIBORs	Gov't Bond
%TELBORs	TELBORs	Gov't Bond
%TALIBIDs	TALIBIDs	Gov't Bond
%TALIBORs	TALIBORs	Gov't Bond
%TRLIBORs	TRLIBORs	Gov't Bond
%TURKIBORs	TURKIBORs	Gov't Bond
%TreasuriesConstant	Treasuries Constant	Gov't Bond
%TreasuryComposites	Treasury Composites	Gov't Bond
%TBillsAuctionAverage	TBills Auction Average	Gov't Bond
%TBillsSecondaryMarket	TBills Secondary Market	Gov't Bond
%TreasuryCompositesSublist1	Treasury Composites Sublist1	Gov't Bond
%TreasuryInflationProtectedSecurities	Treasury Inflation Protected Securities	Gov't Bond

See [Entity lookup](#) for information about using the dialog box to select an entity.

To select a color for the entity curve:

1. Select the color swatch. A color picker opens.
2. Select a color from the color picker.

Add an historical curve

Historical curves are plotted from past data of the primary entity; in other words, what the main curve looked like a week, a month, or a year ago.

To add an historical curve to the chart, select **Add Historical** from the **Compare** menu.

The **Set Comparison Date** dialog box opens.

To select a color for the historical curve:

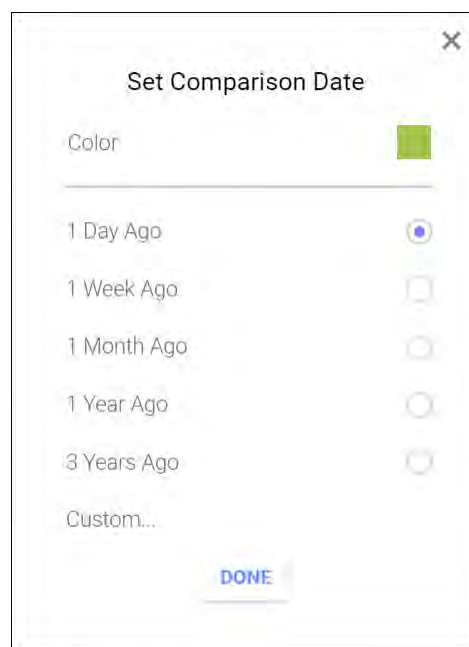
1. Select the color swatch. A color picker opens.
2. Select a color from the color picker.

To select a time period for the curve, select a radio button from the list of historical dates.

To select a custom historical data:

1. Select **Custom....**
2. Select a date from the calendar.

To close the dialog box and create the curve, select **DONE**.

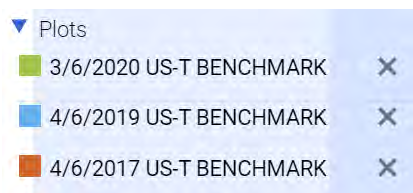


NEW v8.2 Historical curves are relative to the date of the primary curve. For example, a “1 Week Ago” historical curve will always show data for the previous week relative to the current date, whether the chart is reopened a week, a month, or a year from now. Use the “Custom...” selection to choose a fixed point that will not adjust over time.

Plots display

Secondary curves are listed in the Plots display.

To open the display, select the ► **Plots** control:



Remove curves

To remove a curve from the chart, select the **X** next to the entry that identifies the curve in the Plots display.

Change curve color

1. Select the color swatch next to the entry that identifies the curve in the Plots display.

A color picker opens.

2. Select a color from the color picker.

Curve spreads

A curve spread is the difference in value between instruments, whether the instruments are on the same curve or on different curves.

To show the spread between instruments:

1. Select one or more data points.

Selected points are indicated by an outer, concentric circle.

2. Hover your mouse over another point.

The spreads are shown by guidelines from data point to data point along with the percent difference. For easy visual reference, the color of the text that shows the spread percentage matches the color of the associated selected data point.

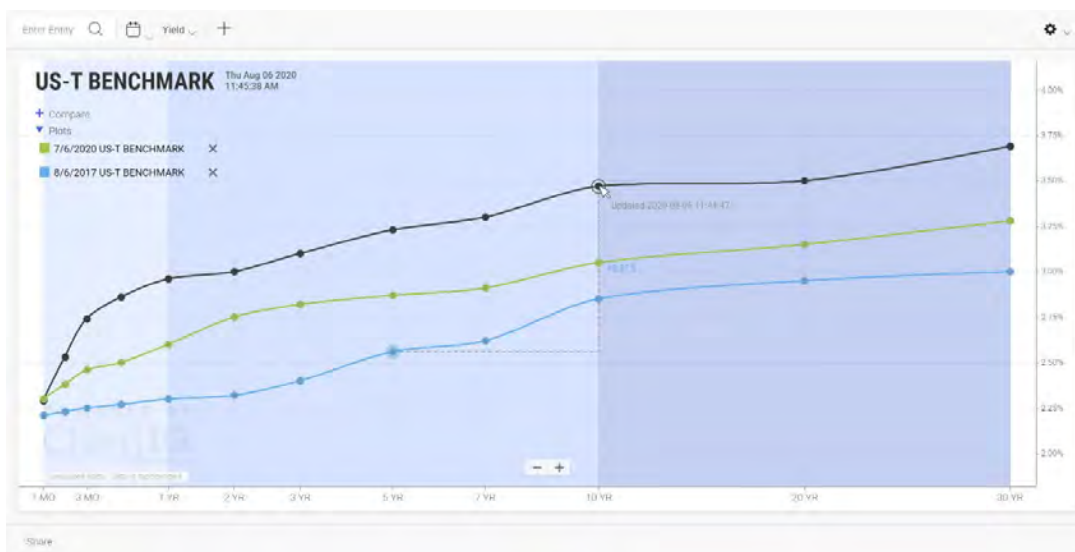


Figure. Curve spreads of 5 YR 8/6/2017 and 10 YR 7/6/2020 vs. 10 YR 8/6/2020.

Varying instrument sets

Term structure charts can display curves for multiple entities when the entities don't share the same set of maturities for the array of instruments in the curve. For example, the U.S. Treasury yield curve contains maturities (instruments) of 1, 2, 3, and 6 months, but the yield curve of

other sovereign bonds may not contain these short-term maturities. Term Structure lets you compare the curves just the same (if the entities have at least one instrument in common).

For each compared entity:

- If instruments are missing on the left or right sides of the chart, the curve is not drawn there.
- If instruments are missing in the middle of the curve, the line is drawn to connect the existing points, but data points are not drawn for the missing instruments.
- If the entity has only one instrument that is shared with the other compared entities, a point is drawn for the instrument (with no line).

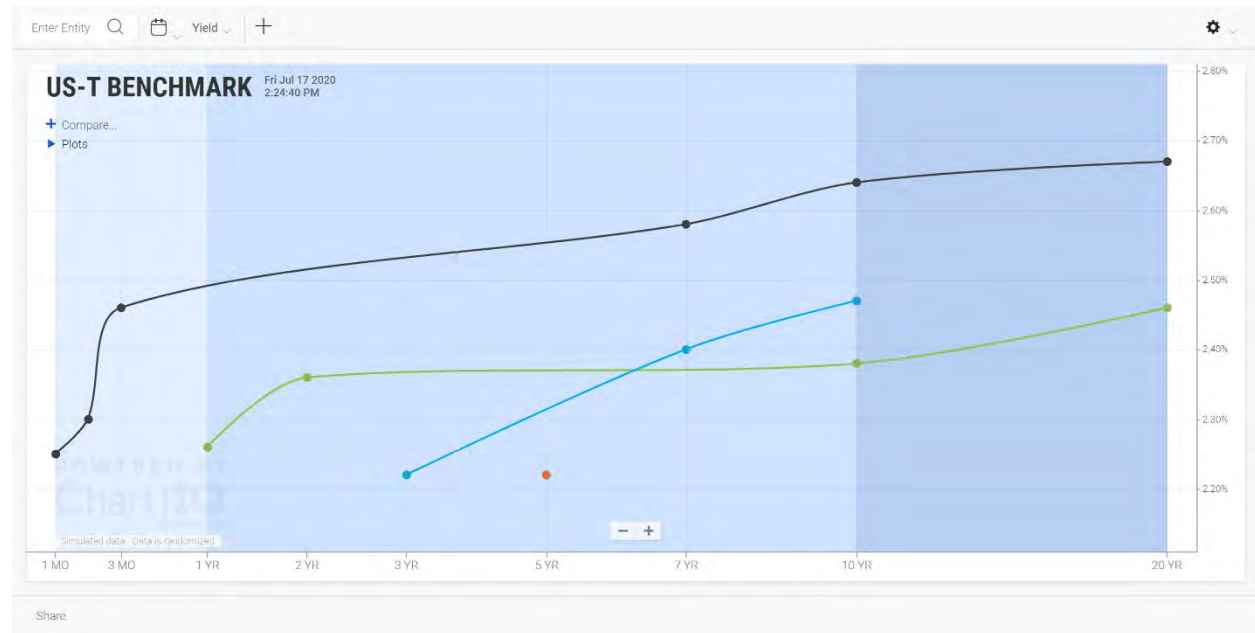


Figure. Term structure chart comparing entities with varying instrument sets.

Share

The Share feature enables you to create an image of a chart and share the image from a URL. See Share above.

Zoom

To zoom the entire chart, select the and buttons at the bottom of the chart; to zoom in, to zoom out.

On touch devices, pinch the screen to zoom out, press the screen with two fingers then spread the fingers apart to zoom in.

The scale of the x- and y-axes can be zoomed by selecting either axis and dragging up or down for the y-axis or left or right for the x-axis.

The up and down arrow keys also zoom the chart.