MARKET-Q^{SM} Quick Reference Guide

WORKSPACES (A WORKSPACE IS A COLLECTION OF PAGES)

Upon exiting the program, you will be prompted to save your workspace, or you can use some of these other techniques to save and access workspaces.

1. **Save workspace (Ctrl-S)** — Select File, Save Workspace.
2. **Export (back up) workspace**— Select File, Export Workspace to File.
3. **Import (restore) workspace** — Select File, Import Workspace from File.
4. **Reload workspace** — Select File, Load Workspace or click the Home icon 🏠 to go back to the previously saved workspace.
5. **Access workspace history** — Select File, Local Workspace History to access recently saved workspaces.

PAGES (A PAGE CONTAINS ONE OR MORE WINDOWS)

The default workspace in Market-Q includes a series of preset pages that appear at the bottom or top as tabs.

Select Page — Click the page tabs.

- **Create New Pages — 3 ways:**

1. **Select File, New Page Templates** — Enter the page name and select the page layout. Click OK. Set up your page by dragging the icons from the toolbar to the desired location.
2. **Select File, Page from the menu** — This will display a page with 2x2 windows. Set up your page by dragging the icons from the toolbar into the page. Double click on the page tab at the bottom to name the page.
3. **Select the "+" tab at the right side of the page tabs set** — This will display a page with 2x2 windows. Drag the icon from the toolbar into the page. Page tabs can also be moved (left-click, drag and drop) or copied (right-click, copy page). Rename the page as you wish.

KEY INFORMATION ON YOUR FAVORITE WINDOWS

- **Using the Snap Quote Window**

Enter a symbol in the Snap Quote window to update all linked windows on all pages. ⊖ **Snap Quote:** [▼] [🔍] [Go]

- **Using the Watch List Window**

The Watch List window can be used to create and access multiple symbol lists and to display them as a single list (**Watch List**), as multiple lists (**Summary**) or to track gains and losses (**Portfolio**).

The "Symbol List" is your default list of symbols. Follow the steps given below to create additional symbols lists and to apply the proper headings and view:

1. **Click** the 🔃 icon and choose Add new symbol list.
2. **Enter** the Symbol List Name and click OK.
3. **Enter** the symbols in the symbol list.
4. **Pick** your column heading set from the Heading drop-down menu or create your own set. (Choose the Portfolio heading to display the column heading for monitoring gains and losses.

The total value will appear at the bottom of the window.)

5. **Select** Watch List or Summary from the View drop-down menu. The Watch List displays a single set of symbols. Summary displays repetitive column sets in the same window.

Repeat steps 1 - 5 to set up additional symbol lists. Once created, you can access a symbol list from any page.

Quick Tips:

1. **Change Symbol in all linked windows** — Left-click a symbol in the Watch List to update all the linked windows.
2. **Access News** — Right-click the symbol and select News.
3. **View Chart** — Right-click the symbol and select Chart. To view previous data, click on the chart and drag the mouse.
4. **Add a Title to a set of symbols** — Type a # followed by the desired text in any row in the Watch List.
5. **Drag and Drop symbol(s)** — Left-click and hold a symbol in the Watch List. Drag it to any other window (Detailed Quote, Chart, News, Time & Sales, etc.). Then, drop it into the selected window.
6. **Insert and Delete rows** — Right-click on a row to insert or delete one or multiple rows.
7. **View Flags** — Choose the Flags field to view research flags, condition codes, corporate actions and news indicators.

- **Using the Fundamentals Window**

The Fundamentals window features a company profile, ratios, estimates, earnings, ratings and ownership (including ownership data for individual and institutional stockholders) and financial statement pages from one source, Capital IQ, for both U.S. and Canadian markets.

- Easy-to-print pages are integrated into Market-Q and easy to save as PDFs for emailing to clients.
- A tree-style menu section offers quick access to the desired page, as well as ability to switch from one page to another.
- Add the most frequently used pages to a list of favorites.

- **Using the News Window**

Click and drag the News icon from the toolbar to display the News window. Use the Filter drop-down menu to control the news display.

1. **All News** — Display all news for which you are entitled.
2. **Keyword** — View news by keywords, such as "Estimates" or "Earnings".
3. **Category** — Filter news by category; for example, "Hot News", "Interest Rate News" or "Central Banks".
4. **Symbols** — View news by symbol(s). You can type in the symbol(s) or automatically display the news for the symbol in the Snap Quote window if the News window is linked.
5. **Watch List** — Display all news for symbols in the selected symbol list.
6. **Custom** — Specify your search criteria and save it.

OTHER SELECTED FEATURES

• Managing Alerts

Setting Alerts — To set an Alert, right-click on a symbol, select Alerts and the type of alert you wish to add. The Alerts dialog box appears. Select the type of alert (i.e., News, Last, High, etc.) and the value. An "H" for High or an "L" for Low will appear in the field of the symbol that the alert is set on.

Tracking Alerts — To track Alerts, select Utilities and View Alerts from the main menu. View the list of active and triggered alerts.

Alerts Notification — To control how you'll be notified of an alert, choose Utilities, Preferences.

1. The field with the triggered alert will change colors.
2. The Alert Notification dialog box will appear.
3. The Alert Indicator will appear in the system tray.
4. An audio alert will sound.

• Dynamic Data Exchange (DDE)

Right-click on a symbol and select DDE to extract a symbol or group of symbols from Market-Q and monitor in Microsoft Excel. RTD (Real-Time Data) can be used for more advanced spreadsheet operations, such as cell referencing.

• Title Bar Icons

Symbol Search 🔍 — Search by name, exchange, instrument type.

Symbol Linking 🔗 🔗 — Link and unlink windows by clicking the linked or unlinked chain.

Copy Window 🗗 — Copy the window and pop it out outside the page. The window will be saved as part of the workspace.

Hide and Unhide Titles — Click the pull-down menu and select Hide Titlebar. Click the top of the window to display the title bar.

Key Market Indices

Symbol	Description
$TSX-TC	S&P/TSX Composite Index
$JX-TC	S&P/TSX Venture Composite Index
$INDU	Dow Jones Industrial Average
$TRAN	Dow Jones Transportation Average
$UTIL	Dow Jones Utility Average
$SPX	S&P 500
$COMPQ	NASDAQ Composite
$NDX	NASDAQ 100
$NYA	NYSE Composite
$VIX	Options Volatility Index
$TNX	10 Yr T-Note Interest Rates
$TYX	30 Yr T-Bond Interest Rates

Key Market Statistics

Symbol	Description
$ADVQ	NASDAQ Advancing Issues
$DECLQ	NASDAQ Declining Issues
$TICKQ	NASDAQ Cumulative Tick
$TVOLQ	NASDAQ Total Volume
$TRINQ	NASDAQ TRIN
$ADV	NYSE Advancing Issues
$TICK	NYSE Cumulative Tick
$DECL	NYSE Declining Issues
$TRIN	NYSE TRIN
$TVOL	NYSE Total Volume

• Toolbar Icons

The toolbar icons allow you to add new windows in two ways:

1. **Add a new window to the page** — Left-click and drag any icon to the desired location within the page. A red border will appear, indicating where the new window will be placed.
2. **Open a new window outside the page** — Left-click the icon to open the window outside the page.

Icon	Description
Watch List	Market monitor to display quotes
Detailed Quotes	Detailed view of instrument
News	News by symbol, plus searching
Chart	Advanced charting, featuring technical studies and drawing tools
Time & Sales	Time & Sales display
Market Depth	Level 2 information
Stock Options	Equity options by expiration month
Fundamentals	Company research and fundamentals
Hot Lists	100+ preset scans
Browser	Browser window to display web content

Special Symbols/Extensions for NYSE and AMEX

Category	Format	Example
Class stock	symbol.A	BRK.A
Preferred stock	symbol/P	AA/P
Preferred series	symbol/PA	ADM/PA
Warrant	symbol/W	GG/W
Warrant series	symbol/WA	QGP/WA
Right	symbol/R	SPF/R
When-issued	symbol/I	GES/I
Units	symbol.U	HLD.U

Special Symbols/Extensions for TSX and TSX Venture

Category	Format	Example
TSX Listed	symbol-TC	RY-TC
TSX Venture Listed	symbol-VC	TIC-VC
Canadian Preferreds	sym/PA-TC, sym/PB-TC	POW/PA-TC, POW/PB-TC
Canadian Warrants	sym.WT-TC, sym.WT.A-TC	NBD.WT-TC, NGD.WT.A-TC
Canadian Unit Trusts	symbol.UN-TC	REI.UN-TC

NASDAQ 5th-Character Definitions

5th Character	Definition
R	Rights
U	Units
W	Warrants
Y	ADR (American Depository Receipt)

Interactive Data